

**IGNATIAN EDUCATION FOR SOCIAL
TRANSFORMATION IN RURAL ECUADOR**

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Declaration

I hereby confirm that the work presented in this thesis is my own.

P. F. Image

Abstract

IGNATIAN EDUCATION FOR SOCIAL TRANSFORMATION IN RURAL ECUADOR

Catholic Social Teaching proclaims the integral human development of all, from basic necessities to collective and spiritual dimensions, as a basic principle of justice pre-announcing the justice of the Kingdom. It offers, however, no universal solution as to how to achieve this, recommending instead that each Christian community should devise its own solutions. The challenge of delivering a contextualized option for the most vulnerable thus falls to Catholic Social Praxis.

Children suffer particularly harshly from poverty, which affects all dimensions of their lives and prevents them from developing their potentialities, thus determining the future of following generations. Education has a vital role to play in redressing this injustice and promoting social transformation. Religious orders and faith-based organizations have long accepted the challenge of forming the whole child in challenging situations. A teaching order such as the Society of Jesus, with its commitment to social justice, provides a perfect example of this in its praxis of *educación popular* in limit situations - in this case, a deprived area of the Ecuadorian Andes.

The thesis first traces the Society's understanding of mission since its foundation, and more particularly the evolution of its social apostolate in parallel with both Catholic Social Teaching and new secular concepts of human rights, justice and human development. It then turns to the Jesuit mission of education, exploring first Ignatius's vision of education, then the impact of integrating notions of social responsibility and justice into the education apostolate. This evolution is explored with particular reference to Latin America: the work of St Alberto Hurtado in Chile; the emergence of *educación popular*; Paulo Freire's method of conscientisation and the Latin American Bishops' formulation of *educación liberadora* as liberation theology was emerging. The question marks raised by Juan Luis Segundo in connection with Freire's methods highlight the theoretical and practical issues of

educational justice in a continent where the disparity between the many and the privileged few remains stark. These issues are explored in connection with an example of the Society's praxis of *educación popular*: the founding and expansion of Fe y Alegría. The complexities of the process highlight the need to assess the outcomes of such praxis for justice and transformation. A methodology involving a cycle of context analysis, planning, action and reflection will be used for the qualitative study of two Ignatian-inspired organizations working in the deprived central highlands of Ecuador.

In the search for a potential tool to yield further, quantitative data the thesis turns to modern visions of justice and explores in particular the Capability Approach (CA) developed by Amartya Sen and Martha Nussbaum. The flexibility of the CA means that it can be adapted to provide quantitative data relating to an institution's effectiveness in promoting collective as well as transcendental capabilities. This, as well as recent capability-based studies assessing the impact of NGOs on children's development, leads to the conclusion that the CA is a suitable tool for a quantitative evaluation of the impact of Ignatian *educación popular* on all dimensions of children's development. The various steps to be followed in the field in order to obtain these data are explained.

The narrative then focusses on the case of three small rural Fe y Alegría schools offering formal education to indigenous children. The study begins with a thorough context analysis to establish the structures of living together and potential obstacles to individual and collective agency. The method used in the field is then described. Result analysis is based both on qualitative data (documents, participant observation, interviews) and on quantitative data from questionnaires to children and parents and children's group work. The findings highlight a high level of adaptive preferences regarding basic necessities, as well as pervasive gender inequality, widespread violence and ambiguous results regarding participation and spirituality. Further reflection opens up onto wider issues: the effectiveness of contextualized Ignatian pedagogy in developing critical thinking and agency for change; the barriers placed on young women in particular by the structures of living together; the search for suitable curriculum models; the nature of 'transforming spirituality' and the future of

Ignatian *educación popular*. It concludes that a full statement from the Magisterium would provide the basis of a complete, coherent system of justice for children.

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Ethical Approval

In Ecuador both the Society of Jesus and Fe y Alegría Ecuador were consulted in 2014 as to the feasibility and desirability of a study of Ignatian *educación popular* for social transformation in Ecuador. Both approved the concept in principle. Contact with both organizations was maintained throughout the study. Ethical approval for the project was sought from the Heythrop College Ethics Committee. This was granted on 22 November 2015 and covered the first eleven months in the field. It was then renewed on 6 March 2017 to cover the second period of fieldwork (March-December 2017).

A Basic Disclosure was sought from the Disclosure and Barring Service (DBS) before travelling to Ecuador. This was issued on 30 November 2015.

The purpose of and detailed plan for the research were put forward to Fe y Alegría Ecuador at the beginning of the actual fieldwork in March 2016. After discussion with the organization both at local and national level formal approval was granted for the research. Full details of this process are reported in Chapter 7, Section 7.1. Following the transfer from Heythrop College to the School of Advanced Study the latter reviewed all ethical approvals granted to Heythrop students. Formal confirmation of approval according to the School's internal ethical assessment process was given on 29 May 2019 (Reference No. SASREC_1819-385-Heythrop-PhD).

Abbreviations

AG	<i>Ad Gentes</i>
AIG	Acción Integral Guamote
BEC	Base Ecclesial Community
BV	Buen Vivir
CA	Capability Approach
CECIB	<i>Centro Educativo Comunitario Intercultural Bilingüe</i> (Intercultural Bilingual Education Centre)
CEFA	<i>Campamentos Ecuatorianos Fe y Alegría</i> (Secondary-age Christian leadership programme)
CELAM	<i>Consejo Episcopal Latinoamericano</i> (Latin American Episcopal Council)
<i>Const.</i>	<i>The Constitutions of the Society of Jesus</i>
CST	Catholic Social Teaching
CSPraxis	Catholic Social Praxis
CV	<i>Caritas in Veritate</i>
D	Decree
DCE	<i>Deus Caritas Est</i>
DH	<i>Dignitatis Humanae</i>
DM	<i>Dives in Misericordia</i>
EG	<i>Evangelii Gaudium</i>
EN	<i>Evangelii Nuntiandi</i>
FBO	Faith-based organization
FIFYA	<i>Federación internacional Fe y Alegría</i> (International Fe y Alegría Federation)
FyA	Fe y Alegría
GC	General Congregation of the Society of Jesus
GE	<i>Gravissimum Educationis</i>
GS	<i>Gaudium et Spes</i>
HDCA	Human Development and Capability Association
HDI	Human Development Index
IHD	Integral Human Development

IHDI	Inequality-adjusted Human Development Index
ILO	International Labour Organization
IRFEYAL	Instituto Radiofónico Fe y Alegría (broadcasting station)
<i>JW</i>	<i>Justice in the World</i>
LEV	Libreria Editrice Vaticana
<i>Med.</i>	Medellin, Second General Conference of the Bishops of Latin America
MDG	Millennium Development Goals
MIFA	<i>Movimiento Infantil Fe y Alegría</i> (Primary-age pastoral programme)
<i>MM</i>	<i>Mater et Magistra</i>
NGO	Non-governmental organization
<i>OA</i>	<i>Octogesima Adveniens</i>
P4C	Philosophy for Children
<i>PC</i>	<i>Perfectae Caritatis</i>
<i>Puebla</i>	Third General Conference of the Bishops of Latin America
<i>PP</i>	<i>Populorum Progressio</i>
<i>PT</i>	<i>Pacem in Terris</i>
<i>RM</i>	<i>Redemptoris Missio</i>
SK	Sumak Kawsay
SIPEI	International Seminary for Ignatian Pedagogy and Spirituality
<i>Sp. Exx.</i>	<i>Spiritual Exercises</i>
<i>SRS</i>	<i>Sollicitudo Rei Socialis</i>
UAP	Universal Apostolic Preferences of the Society of Jesus 2019-2029
UNICEF	United Nations International Children's Emergency Fund

Terminology

Agency

1. (individual or collective): the ability or ‘freedom to bring about achievements one values and attempts to produce.’¹
2. (socio-historical): ‘what human beings can really do or be given the particular socio-historical structures in which they are living.’²

Aggiornamento: Italian for ‘bringing up to date’; in relation with the Second Vatican Council *aggiornamento* refers to the modernization of the Church and its institutions.

Asistencialismo: ideology or policy relying on external aid to solve social issues rather than addressing their structural causes or developing the beneficiaries’ agency.

Autonomy

1. capacity for self-determination;
2. capacity to make reasoned, free decisions.

Ayllu (community): Kichwa for an extended family or inter-related group of families living in community.

Barrio: urban district, neighbourhood.

Buen vivir: a concept based on Sumak Kawsay, the Andean concept of the good life, based on the ideal of living in harmony with other human beings as well as nature. As a socio-political concept it also incorporates elements of other traditions of the good life, including Aristotle’s *eudaimonia*. In Ecuador’s 2008 Constitution it was presented as an alternative to capitalism and neo-liberal approaches.

¹ Amartya Sen, *Inequality re-examined* (Oxford: Clarendon Press, 1992), p. 57.

² Séverine Deneulin, ‘Necessary Thickening’: Ricoeur’s Ethic of Justice as a Complement to Sen’s Capability Approach’ in *The Capability Approach: Concepts, Measures and Application*, ed. by Sabina Alkire, Flavio Comim and Mustafa Qizilbash (Cambridge: Cambridge University Press, 2008), p. 37.

Campesino: peasant.

Child/ren: ‘A child means every human being below the age of eighteen years unless under the law applicable to the child, majority is earlier.’³

Comunidad: Spanish word for *ayllu*.

Conscientisation (Portuguese *conscientização*, Spanish *concientización*): originally used in adult non-formal education, process of raising the awareness of social reality and its structural causes in order to encourage agency for social transformation. In the context of *educación popular* or *educación liberadora*, it refers to making learners aware of the conditions of oppression in which they live and fostering their desire to act for social transformation.

Desarrollismo: ideology whose main objective is mere economic growth judged according to Western capitalist views of economic success and autonomy. This is based on the theory that all countries follow the same linear path to development from primitive to modern to industrialized.

Educación popular (popular education): initially mainly non-formal education for adults rooted in the learners’ prior knowledge and experience of their own reality, it is a dialogical pedagogy aimed at teaching literacy, numeracy and awareness of the learners’ social conditions in order to promote agency for social transformation. Often promoted by church authorities the twentieth century, it then also included evangelization. With the decrease in illiteracy *educación popular* is now more often formal education leading to recognized qualifications for both children and adults but it still explicitly retains the purpose of forming agents of social transformation.

Educación liberadora (liberating education): used originally by the Latin American Bishops at Medellin under the influence of Paulo Freire, this described the

³ United Nations Convention for the Rights of the Child (1989), Article 1, <<https://www.unicef.org/child-rights-convention/convention-text>> [accessed 12.12.2019].

dialogical pedagogy of *educación popular* with a particular emphasis on liberating learners from oppression and less than human conditions developing agency for social transformation with a view to reform rather than revolution.

Evangelical: the standard term to refer to all Protestant denominations in Ecuador.

Fe y Alegría (Faith and Joy): name given to a small school originally started in the 1950s in a poor district of Caracas; now an international movement of education for social transformation across Latin America and beyond.

Humanización or ***hominización***: Spanish word for *humanization* describing the process of ‘growth in humanity’⁴ or development of the whole person following the elimination of less human conditions and the setting up of more human conditions. The various stages of this growth or development are outlined in *PP* 21.

Ideario: ethos or vision statement.

Ignacianidad: characteristic features of Ignatius of Loyola’s spirituality or the mode of proceeding of his Order.

Ignatian: ‘often used now in distinction to Jesuit indicating aspects of spirituality that derive from Ignatius the lay person rather than from the later Ignatius and his religious order, the Society of Jesus, the former being more appropriate for and acceptable to lay people.’⁵

Indígena: indigenous; an indigenous person.

Integral development (Latin *progressio integra*, Spanish *desarrollo integral*): the development of the whole person as referred to in *Populorum Progressio* (variously

⁴ Paul VI, Encyclical *Populorum Progressio: On the Development of Peoples* (Vatican: LEV, 1967), 15.

⁵ *Do you speak Ignatian?* (2002), online booklet available at <https://www.siprep.org/uploaded/about_si/documents/Do_You_Speak_Ignatian.pdf> [accessed 04.11.19].

translated in English as 'complete',⁶ 'well-rounded'⁷ or 'development of the whole man'⁸ and later used by Latin American Bishops from the 1968 Medellín Conference.

Kichwa: the indigenous language used in the Ecuadorian Highlands.

Magisterium: the Pope and the college of bishops in communion with him who alone are entrusted with 'the task of giving an authentic interpretation of the Word of God, whether in its written form or in the form of Tradition.'⁹

Mística: collective expression, through symbols or art forms, of the struggles of a social movement. Christian *mística*, more particularly, implies 'a commitment of solidarity with the poor [...] a commitment of personal and social transformation, present in the utopia preached by Jesus of the Kingdom of God.'¹⁰

***Nation* (*nación*)** and ***nationality* (*nacionalidad*)** are used in Ecuador to describe homogeneous ethnic groups sharing a territory, language and common customs, e.g. the Puruhá nation, or Puruhá nationality. This does not carry connotations of self-determination.

Promoción humana (human development): Spanish translation of the Latin *promotio humana* used in *Populorum Progressio* and used in Latin American to describe a human-centred development. The concept refers to 'the natural improvement of individuals or groups who through effort, planning, assistance or luck, see their situation improve and acquires greater moral, social or spiritual wealth or opportunities.'¹¹

⁶ *PP*, title of Part I.

⁷ *PP* 14.

⁸ *PP* 14.

⁹ Catechism of the Catholic Church (Vatican: Libreria Editrice Vaticana, 2003), 85 and 100.

¹⁰ Leonardo Boff (1993)

¹¹ Pedro Chico González, *Diccionario de Catequesis y Pedagogía Religiosa* (Lima: Editorial Bruño, 2006)

Proyectismo: in the context of late twentieth century Andes, proliferation of unrelated projects sponsored by governments or NGOs in a given area which do not contribute to a unified vision of development in that area.

Reformatio: Latin term for transformation; from *reformare*: to mould again, to transform. **Reformatio mundi:** transformation of the world.

Pietas: one of the chief virtues of Ancient Rome, referred to both religious piety and duty. Used in connection with Jesuit education, it refers to finding these virtues in classical texts and transposing them into a Christian context.

Puruhá (plural Puruháes): the indigenous ethnic group in the Chimborazo province.

Responsabilidad social (social responsibility): an awareness of the ‘obligations of justice and charity in society’¹² to be fulfilled. For the lay faithful, this also includes ‘responsibilities regarding the building, organization and functioning of society’.¹³

Sierra: the highlands.

Sumak Kawsay: Kichwa for ‘the good life’, an Andean concept describing a life lived in harmony with one’s community and the Pachamama (Mother Nature).

Trinitarian vs. universalist: two different approaches to mission, distinguished by whether they seek to be explicitly Christian (believing in the doctrine of the Trinity or ‘Trinitarian’), or to experience God and work for transformation in a deist framework unrelated to any particular doctrinal teaching (‘universalist’).

¹² Pontifical Council for Justice and Peace, *Compendium of the Social Doctrine of the Church* (Vatican: LEV, 2005), 83.

¹³ *Compendium*, 83.

Neither the Pope nor the Church have a monopoly on the interpretation of social realities or the proposal of solutions to contemporary problems. Here I can repeat the insightful observation of Pope Paul VI:

*“In the face of such widely varying situations, it is difficult for us to utter a unified message and to put forward a solution which has universal validity. This is not our ambition, nor is it our mission. It is up to the Christian communities to analyse with objectivity the situation which is proper to their own country”.*¹⁴

¹⁴ Pope Francis, Apostolic Exhortation *Evangelii Gaudium*: the joy of the Gospel (Vatican: LEV, 2012), 184.

Introduction

Catholic Social Teaching places firmly on Christian communities the task of articulating contextualized solutions to the social issues facing them. The mission of each and every one of them, as Pope Francis reminds us, is to be ‘an instrument for the liberation and promotion of the poor, and for enabling them to be fully a part of society.’¹

In order to identify the most pressing needs the Church has in the last fifty years listed in her documents the many categories of suffering, marginalization and vulnerability. This includes the poor, the oppressed, the exploited, discriminated ethnic groups, those denied political or religious rights, migrants and refugees, the homeless, the unemployed, the disabled, *campesinos* and women. One category is implicitly included in this list but never explicitly mentioned: children.

1. Poor children and the Church

According to the World Bank,

[t]he face of poverty is primarily rural and young. 80 percent of the extreme poor and 75% of the moderate poor live in rural areas. *Over 45% of the extreme poor are children younger than 15 years old.*²

Children are disproportionately represented among the poor throughout the world. Childhood specialists have stressed how multidimensional poverty also overly affects children because ‘they often suffer irreversible forms of capability failure in terms of mental, physical, emotion and spiritual development. This in turns promotes inter-generational transfer of poverty.’³ The recommendation is that children’s

¹ EG 187.

² Aguilar Castaneda and others, *Who are the Poor in the Developing World?* Policy Research Working Paper No. 7844, Poverty and Equity Global Practice Group (Washington, D.C.: World Bank, 2016), p. 3 (italics *not* in the original).

³ Flavio Comim, Jérôme Ballet, Mario Biggeri and Vittorio Iervese, ‘Introduction: Theoretical Foundations and the Book’s Roadmap’ in *Children and the Capability Approach*, ed. by Mario Biggeri, Jérôme Ballet and Flavio Comim (London: Palgrave Macmillan, 2011), p. 4.

agency should be brought into play ‘when it comes to evaluating their condition or determining how it should be changed. [...] Any justifiable theory of childhood nowadays incorporates a strong agency aspect that actively involves children in their own development.’⁴ Since integral human development is at the heart of social teaching and children in poverty such a vulnerable group, what does Catholic Social Teaching tell us about children’s development and agency?

There is a great deal in Catholic Social Teaching about unborn children and their right to life. By contrast, it has remarkably little to say on children after birth: their rights, their agency, their autonomy. Children, and children in poverty in particular, have been described as being ‘barely visible’⁵ and not the subjects of a coherent treatment of justice. A response then needs to be sought in the part of the Catholic social tradition that transforms the world ‘not just by raising our voices but by rolling up our sleeves.’⁶ Only praxis – action based on reflection upon the truth, in the Aristotelian sense – can provide the conditions for authentic human development. Only through praxis can justice for children be achieved and evaluated. For this reason, although the starting point of the thesis is Catholic Social Teaching (CST) as ‘the accurate formulation of the results of a careful reflection on the complex realities of human existence’⁷ by the Magisterium, its main focus is Catholic Social Praxis (CSPraxis), the practical application of this teaching according to local conditions and needs. Considering these two aspects separately makes it possible to distinguish more clearly the different answers each provides and see more clearly where the strengths and, maybe, the lacunae of each are to be found and addressed. Further reflection on these and their interaction is the subject of ‘the free study of

⁴ Gottfried Schweiger and Gunter Graf, *A Philosophical Examination of Child Poverty* (London: Palgrave Macmillan, 2015), p. 142.

⁵ Ethna Regan, ‘Barely visible: The Child in Catholic Social Teaching’, *Heythrop Journal* 55/6 (2014), 1021-2032.

⁶ Pope Francis, Address to the Korean Council of Religious Leaders (Vatican: LEV, 2017).

⁷ John Paul II defines it as ‘the accurate formulation of the results of a careful reflection on the complex realities of human existence, in society and in the international order, in the light of the faith and of the Church’s tradition. Its main aim is to interpret these realities, determining their conformity with or divergence from the lines of the Gospel teaching on man and his vocation, a vocation which is at once earthly and transcendent; its aim is thus to guide Christian behavior.’ John Paul II, *Sollicitudo rei socialis* (Vatican: LEV, 2007), 41.

researchers who do not engage the Church's authority',⁸ what is sometimes referred to as the 'tradition of interpretation'⁹ of official church social teaching, or the 'non-official Catholic social thought'¹⁰ of theologians, specialists in various disciplines and practitioners, which will inform the further evolution of CST.¹¹

Focussing on human development and recognizing the absence of a 'universal solution' Paul VI gives us in *Populorum Progressio* guidelines as to the nature of authentic, 'integral' development: the development of the whole person following the transition from less than human conditions to truly human ones':¹²

What are less than human conditions? The material poverty of those who lack the bare necessities of life, and the moral poverty of those who are crushed under the weight of their own self-love; oppressive political structures resulting from the abuse of ownership or the improper exercise of power, from the exploitation of the worker or unjust transactions.

What are truly human conditions? The rise from poverty to the acquisition of life's necessities; the elimination of social ills; broadening the horizons of knowledge; acquiring refinement and culture. From there one can go on to acquire a growing awareness of other people's dignity, a taste for the spirit of poverty, an active interest in the common good, and a desire for peace. Then man can acknowledge the highest values and God Himself, their author and end. Finally and above all, there is faith – God's gift to men of good will – and our loving unity in Christ, who calls all men to share God's life as sons of the living God, the Father of all men.¹³

Working towards the establishment of truly human conditions is the mission of each Christian community. Fostering the stages of human development listed in this

⁸ Jean-Yves Calvez, *Les Silences de la Doctrine Sociale de l'Eglise*, Débattre (Paris: Les Editions de l'Atelier, 1999), p. 120. (Calvez was referring here more particularly to theologians).

⁹ Herwig Büchele, *Christlicher Glaube und politische Verkunft*, quoted in Johan Verstraeten, 'Re-thinking Catholic Social Thought as Tradition' in *Catholic Social Thought: Twilight or Renaissance?*, ed. by Jonathan S. Boswell, Francis P. McHugh, and Johan Verstraeten (Leuven: University of Leuven, 2000), 59-78 (p. 62).

¹⁰ Verstraeten, 'Re-thinking Catholic Social Thought', p. 61.

¹¹ 'Far from constituting a closed system, [the Church's social teaching] remains constantly open to the new questions which continually arise; it requires the contribution of all charisma, experiences and skills.' Congregation for the Doctrine of the Faith, *Instruction on Christian Freedom and Liberation* (Vatican: LEV, 1986), 72.

¹² Paul VI, Encyclical *Populorum Progressio: On the Development of Peoples* (Vatican: LEV, 1967), 20.

¹³ *PP* 21.

passage is at the heart of the Church's mission of education: an education that provides integral human development (IHD) as outlined above to all children and, as a preferential option, to children in poverty.

2. The role of education in integral human development

Education is at the root of IHD. The basic skills for survival, literacy and numeracy, are also those needed in order to 'become actively involved in various community organizations, open to discourse with others and willing to do [one's] best to promote the common good.'¹⁴ Higher education and vocational training ensure the further development and future well-being of learners. Beyond this, Christian education aims to form conscience, foster compassion and teach knowledge and love of God as part of educating the whole person. Preparing learners for action for justice is helping transform both individual learners and their communities. It is this aspect of education – the education of the whole child for social transformation – which this thesis considers.

Education has been part of the mission of the Church for centuries. Understood as forming good Christian citizens, it was originally an education 'for the good of the city' more akin to preserving the social status quo. The idea of education as a means of social transformation did not emerge before the beginning of the twentieth century, notably with John Dewey. In Latin America St Alberto Hurtado was influential in showing the suitability of a transforming education for forming a Christian social conscience. The importance of promoting a commitment to social justice in education then developed in parallel with CST until, under the influence of Paulo Freire, education came to be seen as an essential tool for liberation from oppression. The Latin American bishops at Medellin called for an *educación liberadora*, an education that would promote liberation from inhuman conditions by raising social awareness and promoting agency for change.

¹⁴ Council Fathers, *Gravissimum Educationis*: Declaration on Christian Education (Vatican: LEV, 1965), 2.

Whose mission, whose praxis, whose education for social transformation to choose as exemplar? The history of the Society of Jesus provides an ideal framework in this respect. It has been described as the first teaching order within the Catholic Church, and education its primary ministry.¹⁵ Its early sense of mission for the greater service of men was reformulated in its 32nd General Congregation as a very clear commitment to promote justice in the service of faith. And it remains determined to be ‘sent to the frontiers’¹⁶ as necessary in order to serve wherever the need is greater.

3. Ignatian education for social transformation

The plight of children in less than human conditions still, and the role of education in personal development and social transformation are at the root of the thesis. It focusses on a ‘frontier’ situation: that of indigenous children in Chimborazo, a province of the central Ecuadorian Andes with a high level of unsatisfied basic needs, social deprivation and racial discrimination. Concentrating on Ignatian initiatives, it aims to tackle two main questions:

- how does the praxis of an Ignatian education at the frontier achieve the dual goal of IHD for children (and their communities) and social transformation?
- how can the impact of this education be measured and why is it important?

Why ‘Ignatian’ here, rather than ‘Jesuit’? The distinction is important. Strictly speaking, ‘Jesuit’ describes, in legal terms, what directly belongs to the Society: thus a Jesuit college is one directly run by the Society of Jesus. ‘Ignatian’ tends to refer to the spirituality of Ignatius of Loyola or the pedagogy it inspired. Naturally, ‘Jesuit’ and ‘Ignatian’ often combine. For example, the Jesuit education provided in a Jesuit college applies the Ignatian Pedagogical Paradigm, a pedagogical system derived from Ignatius’s spiritual vision. In a frontier context with no Jesuit colleges, such as rural Chimborazo, we may encounter a Jesuit Mission or institution operating alongside Ignatian initiatives with varying degrees of collaboration between them: a

¹⁵ John O’Malley SJ, ‘How the First Jesuits Became Involved in Education’, in *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives*, ed. by Vincent J. Duminuco SJ (New York: Fordham University Press), pp. 56-74 (pp. 56-57).

¹⁶ GC 35, D. 3: ‘Challenges to our Mission Today: Sent to the Frontiers’.

project may in law belong to the Society yet run as a separate, independent or semi-independent entity. Whether a Jesuit or a lay foundation, the Ignatian venture is developed and may continue to be managed according to Ignatian principles. Thus an Ignatian education initiative will foster intellectual development, form a moral and social conscience and promote compassion and ‘that full growth of the person which leads to action – action, especially, which is suffused with the spirit and presence of Jesus Christ’¹⁷ and promotes social justice. This is the case of Ignatian *educación popular*, a highly contextualized education for IHD and social transformation which, certainly in Latin America, has also absorbed many elements of liberation theology and Paulo Freire’s pedagogy for the oppressed.

Examples of these different possibilities are to be found operating in Chimborazo. The Jesuit Mission to the region is an offshoot of the Society of Jesus which has focussed on advocacy for the legal rights of indigenous communities but whose interest in education has been limited. A small FBO initially launched with Jesuit support to provide non-formal education locally now ploughs its own furrow. Fe y Alegría Ecuador is part of an international network of schools founded by a Chilean-Spanish Jesuit in the 1950s and contractually at least, a Jesuit dependency. It focusses explicitly on education for IHD and social transformation. The three rural schools it provides for indigenous children in the region are the subject of the case study.

4. Evaluating and measuring impact

The concept of an ‘objective analysis’ suggested by Pope Francis above is doubly important for CSPraxis. Firstly, an in-depth knowledge of the contextual reality is important for both initial implementation and regular evaluation. This involves an understanding of the broader national and regional context. Against this background, it then requires a more intense focus on a particular location, or a particular group: ‘each local situation will show what reforms are most urgent and how they can be

¹⁷ Peter-Hans Kolvenbach, Address (1989) quoted in *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives*, p. 240.

achieved.¹⁸ This sort of focus is best served by small case studies. Based on thick description, a case study delves into the various layers of reality and provides micro-perspectives which help detect individual pockets of deprivation. It can throw light on the challenges and inequalities of a particular population – be it an immigrant community in a large city, or indigenous communities in isolated rural areas – and also their causes. It may thus be able to suggest where review might be helpful or point to issues with further implications. Whether or not such analyses can achieve total objectivity is a moot point to be further explored in the context of the study. However, they can at the very least fulfil the Ignatian and Jesuit ideal of honesty with the real.

Pope Francis's guidelines allow great flexibility in the quest for tools of evaluation based on a thorough context analysis. Potentially, this may mean using the conclusions of different schools of thought which are not necessarily entirely consistent with CST but may be capable of adaptation for application to CSPraxis. In particular, the possibility of obtaining quantitative as well as qualitative data considerably enhances an analysis and at the very least, lessens subjectivity. The stable population of the three Fe y Alegría (FyA) schools did lend itself to the collection of quantitative data. After exploring possible approaches, the capability-based model used in recent studies on organizations involving children was chosen and adapted to the context.,

5. The thesis: aims and roadmap

The aim of the thesis is to explore the action for IHD of two Ignatian *educación popular* initiatives in a particularly deprived region of the Ecuadorian Andes. After a study of the Ignatian vision of education, the thesis turns to the praxis: the early days of FyA. But evaluation is crucial to praxis, and in the absence of universal solutions there is no universal method of evaluation. A study of different visions of justice shows how the CA can be adapted to provide valuable quantitative data in addition to qualitative sources. Evaluating the impact of a Christian organization's efficacy in

¹⁸ John Paul II, *Sollicitudo rei socialis*: For the twentieth anniversary of Populorum Progressio (Vatican: LEV, 1987), 43.

developing participation, agency or spirituality through quantitative data has not been attempted before. In the case of FyA a capability-based approach has proved to be a valuable tool in providing results which, in turn, can highlight not just local challenges but dilemmas for the Church's mission much further afield.

The thesis is divided into three parts. Part I is devoted to the Society of Jesus and its 'way of proceeding'. Chapter 1 focusses on the Society's understanding of mission since the early days and traces its evolving sense of social justice in parallel with the evolution of CST. Chapter 2 covers the growing involvement of the Society in education until this becomes the Order's primary ministry. Chapter 3 then turns to the praxis of Ignatian *educación popular*, following the chaotic setting up of Fe y Alegría from the first little school in the mid-50s to its current position as an international *educación popular* movement for social transformation, settling on the case of Fe y Alegría Ecuador.

Part II explores the most suitable metric to measure the impact of the two subjects of the case studies. Chapter 4 reminds us of John Rawls's understanding of justice before delving into Amartya Sen's own vision of justice and 'the good life' as well as a utilitarian approach to 'happiness'. The CA is chosen based on its understanding of the multidimensionality of human development as well as the example of CA-based studies on organizations working with children. Chapter 5 examines the methodology these studies used in the field and how this needs adapting in order to reflect the cultural context of the Ecuadorian highlands and measure the impact on the development of agency, moral values and spirituality.

Part III is dedicated to the case study itself, the product of nineteen months' fieldwork in 2016-2017 with a return visit in 2018. Chapter 6 provides the context analysis. It describes the historical and socio-economic background of the Chimborazo province, focussing in particular on the cultural context of indigenous rural communities in the Andes which is the setting of the case studies. Chapter 7 then focusses on three rural FyA schools in the province and the rural and urban controls used for comparison purposes. It describes the mechanics of implementing the methodology outlined in Chapter 5 and relates the main findings of the study.

Chapter 8 reflects on the main themes arising from these findings. It focusses on four challenges in the praxis of delivering education for IHD and social transformation. These concern firstly, the development of critical thinking and participation against the principles of the Ignatian Pedagogical Paradigm; secondly, agency freedom and the opportunity to develop valuable capabilities in a context where the shadow of the hacienda persists still. Thirdly, alternative curriculum models are explored and finally, the difficulties of developing spirituality in a lay context. These issues raise question marks for the future of Jesuit dependencies which are examined.

In summary, Ignatian educational praxis at the frontier has to contend with the socio-cultural context in which it operates. Whatever its scope and methods, regularly measuring impact is crucial to ensuring that action is effectively targeted. In this respect, this study can offer a template for evaluating pastoral projects in Christian education and beyond. But achieving IHD and social transformation is a never-ending process. The conclusion points to two further questions whose answers are not clear-cut. To what extent can this education at the frontier, an essential work of justice, achieve IHD and social transformation as part of the mission of the Church? And, most important, can it make poor children more visible?

Part I

Chapter 1. The Society of Jesus and the concept of mission

‘The greater glory of God and the service of men’

The purpose of the Society of Jesus as stated in the First Formula of the Institute is to propagate the faith and perform works of charity. For Ignatius and his companions, propagation of the faith meant being sent out to unbelievers wherever this might be necessary, alongside spiritual and corporal works of mercy. Spiritual work of consolation was to be rooted in the *Spiritual Exercises*, thus giving the new order a very particular form of spirituality. The First Formula already included a reference to education in Christian doctrine as a special work of charity. This would prove a major influence on the development of the Society, providing two poles of mission.

As general background to the study this chapter focusses first on the concept of mission as understood by Ignatius and the first Jesuits and how the setting up of schools affected the development of the Society. Turning then to the development of the Church’s social teaching (CST) from *Rerum Novarum*, it traces the parallel evolution of the CST and the Society of Jesus’ social apostolate. It concentrates particularly on the understanding of human development which they propose and the emergence of the notion of justice as interaction between faith and love of God and neighbour. It explores, with particular attention to their Latin American context, the impact that a commitment to social justice, human rights and the Church’s understanding of human development has had on the Society since the Second Vatican Council and the practical implications for its mission.

1.1 The Ignatian concept of mission

1.1.1 The new meaning of ‘mission’

Introducing the concept of mission, David Bosch begins with the contemporary understanding of the word. Mission can refer to the

propagation of the faith, the expansion of the reign of God, the conversion of the heathen or the founding of new churches. Bosch reminds us, however, that until the 16th century the term was used with reference to the Trinity: the sending of the Son by the Father and the Holy Spirit by the Father and the Son. He adds that ‘the Jesuits were the first to use it in terms of the spread of the Christian faith among people (including Protestants) who were not members of the Catholic Church.’¹ Tim Noble similarly notes how Ignatius shifted the understanding of mission from a trinitarian term to the task of proclaiming the gospel in deed and word, commenting: ‘At the heart of this engagement was the need to serve in love. [...] Love, together with service, is at the heart of Ignatius’s spiritual experience and vision.’² This focus on love at the heart of engagement is key to fully appreciating the particular Jesuit sense of mission, from its beginnings to its twentieth-century developments.

Ignatius’s understanding of mission is rooted in the grasp and knowledge of God derived from the *Spiritual Exercises*. Noble argues that at the end of the first week of the *Exercises*, ‘it is the experience of God’s love and our failure so often to respond to that love that gives rise to the threefold question “What have I done for Christ? What am I doing for Christ? What ought I to do for Christ?”’³ This is followed, at the beginning of the second week, by the Call of the King; the grace prayed for before this call is ‘the

¹ David J. Bosch, *Transforming Mission: Paradigm Shifts in Theology of Mission*, American Society of Missiology Series, 16 (Maryknoll, NY: Orbis Books, 1999), p. 1. See also Paul Kollman, ‘At the Origins of Mission and Missiology: A Study in the Dynamics of Religious Language’, *Journal of the American Academy of Religion* 79/2 (2011), 425-458, in particular pp. 429-433 on Ignatius of Loyola and *Missio*. Noting that Ignatius never formally explained the shift in vocabulary assigned to him, Kollman writes that ‘by labelling Jesuit apostolic activity ‘mission’, Ignatius defended an existing Christian practice by relation to divine activity, implicitly carrying out what Thomas Kasulis has called a metapraxis, a “philosophical theory about the nature of a particular [religious] praxis.” [...] Given its prior Trinitarian background, mission in Ignatius’s use operates as metapraxis because it connects the actions of believers with the nature of God or reality, correlating human activity with God’s own. It allows believers to say to themselves: “We do this because God is like this”, relating religious practice to divine ontology ... Mission became the work the Jesuits did, work on which they were sent in the same way Jesus was sent by God the Father. Their obedience resembled Christ’s own.’ (p. 431).

² Tim Noble, *Mission from the Perspective of the Other: Drawing Together on Holy Ground* (Eugene, OR: Pickwick Publications, 2018), p. 99.

³ Tim Noble, p. 100.

grace not to be deaf to His call'.⁴ The call to follow Christ has been seen as an echo of 1 Cor. 15:24-26 and John 12:25-26: 'the Gospel of John ... constantly presents us Jesus as 'the One Sent' from the Father. The following of Jesus always carries with it the following of the One Sent, and thus, service to his mission.'⁵ Thus the response to God's love is a desire to follow Christ and participate in his mission.

On the first day of the second week of the *Exercises*, the Incarnation is presented in the first contemplation as the result of the three Divine Persons looking at the whole world and making the decision 'that the second Person would become human to save the human race.'⁶ Exercitants then request that they may 'better follow and imitate Christ.'⁷ Commenting on this exercise, Noble concludes that 'the mission of the follower of Jesus is rooted in the mission of God, depends on it, works from it, and towards it.'⁸ Thus answering Christ's call and serving under His banner means accepting to be sent 'over the whole world to spread His sacred doctrine among all people of every state and condition.'⁹ Exercitants then ask for the grace to be received under Christ's banner in the highest spiritual poverty and if possible actual poverty, and to be prepared to suffer insults and reproaches 'so as to imitate Him more closely.'¹⁰

The point that love ought to find its expression more in deeds than in words is repeated in the note preceding the Contemplation for Attaining Love,

⁴ *Spiritual Exercises*, in *Saint Ignatius of Loyola: Personal Writings*, ed. with introduction and notes by Joseph A. Munitiz and Philip Endean (London: Penguin Classics, 1996), 91. All quotations of the *Spiritual Exercises* are from this source.

⁵ Ignasi Salvat SJ, quoted in Noble, p. 101. The text of John 12:25-26 reads: 'Anyone who loves their life will lose it, while anyone who hates their life in this world will keep it for eternal life./Whoever serves me must follow me, and where I am, my servant also will be. My Father will honour the one who serves me.' (NIV).

⁶ *Sp. Exx.* 102.

⁷ *Sp. Exx.* 109.

⁸ Noble, p. 102. Salvat calls this as 'the concretization of love.'

⁹ *Sp. Exx.* 144.

¹⁰ *Sp. Exx.* 147.

together with a reminder that ‘love consists in mutual communication’.¹¹ Before bringing to mind all the benefits received from God’s love and offering Him ‘everything I have, and myself as well’¹², the exercitant asks simply to ‘be able to love and serve His Divine Majesty in everything.’¹³ Dedicating oneself to Christ’s mission, then, is a gift of self in love in response to God’s love. In this way the *Exercises* should lead to a desire to participate ‘in the universal mission of the One Sent, God’s emissary, Jesus Christ, in the power of the Spirit. Thus we end up with the notion of Jesuits ‘being sent out (like the apostles) to do ministry’.¹⁴

The principles and aims of mission articulated in the First Formula reflect this understanding of humans’ relationship with God and the desire to serve under Christ’s banner, discovered during the *Spiritual Exercises*. It states that:

Whoever desires to serve as a soldier of God
beneath the banner of the cross in our Society,
which we desire to be designated by the name of Jesus,
and to serve the Lord alone
and his vicar on earth,
should, after a solemn vow of chastity, keep what follows in
mind.
He is a member of a Society founded chiefly for this
purpose:
to strive especially
for the progress of souls in Christian life and doctrine
and for the propagation of the faith
– by the ministry of the word,
– by Spiritual Exercises
– by works of charity, and expressly
– by the education of children and unlettered persons in
Christianity.¹⁵

¹¹ *Sp. Exx.* 230.

¹² *Sp. Exx.* 233.

¹³ *Sp. Exx.* 234.

¹⁴ Catherine Mooney, ‘Ignatian Spirituality: A Spirituality for Mission’, *Mission Studies* 26/2 (2009), 192-213, p. 201.

¹⁵ The Five Chapters (1539), quoted in John W. O’Malley SJ, ‘Five Missions of the Jesuit Charism: Content and Method’, *Studies in the Spirituality of Jesuits*, 38/4 (2006), 1-33 (pp. 8-9).

These principles and aims are reiterated in the *Constitutions*.¹⁶ Part VII of the *Constitutions*, which deals with ‘the distribution of the incorporated members in Christ’s vineyard and their relations with their fellowmen’,¹⁷ refers to the vow of obedience to the Pope as regards mission. This vow meant that Jesuits were to be ready to ‘go to any place whatsoever where he judges it expedient to send them for the greater glory of God and the good of souls, whether among the faithful or the infidels.’¹⁸ The Society’s early documents stress the notion of travel. Jerónimo Nadal saw the Jesuit vocation as ‘similar to the vocation and training of the apostles’,¹⁹ explaining that after Jesus Himself who was sent, ‘Paul signifies for us our ministry.’²⁰ But mission meant more than travel, as became evident when the first schools were founded: the *Constitutions* specify that a Jesuit’s labour may be achieved ‘not merely by traveling but by residing steadily and continually in some places where much fruit of glory and service to God is expected.’²¹

The *Constitutions* give varied criteria for choosing where mission should be carried out. Ultimately, ‘anything could be undertaken that was to the service of the universal good ... it is for the service of ... others – the other human and the Divine Other – that mission happens, and whatever benefits that service is good.’²²

¹⁶ Noble, p. 111. Noble, following Kollman, refers to the *Constitutions* as being ‘one of the first attempts consciously to work out the mission of a particular group of people with the church.’ (p. 111).

¹⁷ *St Ignatius Loyola: The Constitutions of the Society of Jesus*, trans. with an introduction and commentary by George E. Ganss, SJ (St Louis: The Institute of Jesuit Sources, 1970). All quotations of the *Constitutions* are from this source.

¹⁸ *Const.* 603.

¹⁹ Nadal, quoted in John O’Malley SJ, ‘Enthusiasm for Mission’ in the *Lord of Friendship: Friendship, Discernment and Mission in Ignatian Spirituality*, ed. by Jacques Haers, SJ, Hans van Leeuwen SJ, Mark Rotsaert SJ and Mary Blickman (Oxford: The Way, 2011), pp 204-215 (p. 208).

²⁰ O’Malley, ‘Enthusiasm’, p. 209.

²¹ *Const.* 603.

²² Noble, p. 113.

1.1.2 ‘Missions in Jesuit charism’

The understanding of mission outlined above, which is at the heart of the Society of Jesus, is based on the information that can be gleaned from the documents. John O’Malley, however, stresses that ‘the concrete reality of Jesuit motivation and action’²³ extended significantly beyond the wording of any document. He first draws attention to two adverbs in the Formula: ‘chiefly’ (*potissimum*) and ‘especially’ (*praecipue*), noting that almost every provision in the *Constitutions* is qualified by one of these two adverbs. In this sense the *Constitutions* are ‘a document filled with escape clauses.’²⁴ Flexibility and adjustment to circumstances, principles explicit in the guidance contained in the *Exercises*, were thus inculcated from the very beginning and should themselves be considered a feature of the charism.

O’Malley then identifies five aspects which he sees as the ‘five missions’ of the Jesuit charism. The first, as outlined in the Five Chapters, is the pastoral-spiritual mission: to strive especially for the progress of souls in Christian life and doctrine and for the propagation of the faith. Christian doctrine was the base of spiritual progress, and the teaching with catechism thus was directly connected with leading a Christian life.²⁵ Beyond this knowledge understood as necessary for salvation, the Jesuits also had the *Spiritual Exercises* to support the spiritual growth of those they served. The ‘propagation of the faith’ related to the missionary character of the Order, especially the fourth vow to obey the pope as regards missions, indicating that their role was not restricted to the faithful.

²³ O’Malley, ‘Five Missions’, p. 10.

²⁴ O’Malley, ‘Five Missions’, p. 8.

²⁵ For the first Jesuits catechism meant ‘teaching the rudiments of Christian belief and practice with a view to living a devout life. The contents of the teaching was the Apostles Creed, the Ten Commandments, and basic prayers, but also included the so-called spiritual and corporal works of mercy – feeding the hungry, clothing the naked, welcoming the stranger.’ O’Malley, ‘How the Jesuits Became Involved in Education’ in *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives* ed. by Vincent J. Duminuco (New York: Fordham University Press, 2000), pp. 56-74 (pp. 60-61).

The second mission is the ecclesiastical mission, as highlighted by a modification to the Formula in 1550 to include ‘the defence as well as the propagation of the faith’, particularly in the light of the spread of Protestantism. Service to the Church was incorporated in the 1550 Bull, although Ignatius was careful to ensure that the Order should not be ‘enmeshed’ in it. Ignatius always preferred to describe the purpose of the Society as service to ‘souls’.²⁶

The third mission can be described as the ‘social’ mission. Among works of charity – the seven spiritual and seven corporal works of mercy as elaborated from the Last Judgment in Matt. 25 – all three versions of the Formula give primacy to the Ministry of the Word. Whilst this followed the established mendicant pattern of ministry, the use of the *Spiritual Exercises* for spiritual accompaniment represented a major difference.²⁷ To the works of charity the 1550 Bull also added reconciling the estranged as well as serving prisoners in jail and the sick in hospital. Here, writes O’Malley, the documentation ‘fails to indicate some of [the Jesuits’] more interesting and innovative undertakings’²⁸ in the early days – hospitals, refuges, asylums, schools – and their impact at the time. O’Malley contends that a better understanding of Jesuit charism can be gained by looking at the works and institutions that lasted (a feature to which the *Constitutions* gave great importance) and contributed to the common good.

It is particularly as regards education and the fourth, ‘cultural’ mission that O’Malley stresses the need to go beyond the documents to understand fully the role of the Society as the first Catholic teaching order. In his view, the commitment to education changed the character of the Order because it meant commitment to this world and made a significant contribution to the common good.²⁹ This cultural mission was thus directly linked to the fifth,

²⁶ O’Malley, ‘Five Mission’, pp. 16-17.

²⁷ O’Malley, ‘Five Missions’, p. 18.

²⁸ O’Malley, ‘Five Missions’, p. 19.

²⁹ O’Malley, ‘Five Missions’, p. 26.

the civic mission, inasmuch as schools were usually requested by the city, paid for by the city, and served local families according to the circumstances of the city. As a result, ‘our charism, and thus our spirituality, has a civic and cultural mode’ although it is rather implicit than explicit.³⁰

Assuming the cultural and civic missions marked a decisive change for the Order. This is not just because it created two poles of mission, itinerant missionaries on the one hand and resident educators on the other. Another important factor was Ignatius’s willingness to adopt a humanistic rather than medieval scheme of studies for Jesuit colleges, an approach which contributed to a more ‘this-worldly’ orientation. This determined the remarkable cultural and intellectual achievements of Jesuit missionaries in the first century of the Order’s existence, from Matteo Ricci in China to Robert de Nobili in India and the Reductions in Paraguay, as well as the foundation of many institutions for the good of their communities.

Exploring these achievements is beyond the scope of this thesis. Rather, we shall now turn to the development of the social apostolate in both the Church and the secular world since the end of the 19th century, and how the Society’s understanding of its mission evolved as a result.

1.2 The Social Apostolate

1.2.1 From *Rerum Novarum* to the Thirtieth General Congregation

A response to the new social conditions brought about by industrialisation, the encyclical *Rerum Novarum* is widely acknowledged as marking the beginning of CST in the modern sense. Its concern for the condition of workers was soon echoed in the documents of religious orders. The following year, the 24th General Congregation of the Society of Jesus (GC 24) voiced its concern for ‘the spiritual care of men, especially workers and

³⁰ O’Malley, ‘Five Missions’, p. 31.

the poor³¹ and the need to attend to their Christian formation through the *Spiritual Exercises*. GC 27 in 1923 reiterated this recommendation, including both formation in the *Exercises* for ‘men especially’³² and training of sodalities in ‘works of charity and mercy’.³³ There was, in effect, nothing new for the Order in these recommendations: they were a direct application of the principles contained in the Formula. For the first time GC 27 mentioned ‘social works’ in this connection. But the question of a social apostolate as such was not fully addressed until 1938, when GC 28 recommended that ‘Ours ... should diligently stress the promotion of the religious, moral, *and even temporal* welfare of workers.’³⁴ It defined the social apostolate as follows:

- a) to provide spiritual help to workers and their leaders, especially through the *Spiritual Exercises* and religious associations;
- b) to explain the social doctrine of the Church [...] to every one – labourers and employers – and to refute erroneous opinions;
- c) to foster unions and social institutes.³⁵

GC 28 also stipulated that Jesuits should be ‘well acquainted with the principal doctrines of the Church on the social order.’³⁶

All these recommendations were, once again, direct applications of the Formula with barely the need for an adaptation to reflect contemporary socio-economic conditions. GC 29 reiterated the same points in 1946 and also provided for the formation of Centres for Social Action and Research.³⁷

³¹ GC 24, D. 20, n. 4, in *For Matters of Greater Moment: The First Thirty Jesuit General Congregations*, ed. by John W. Padberg SJ, Martin D. O’Keefe SJ and John L. McCarthy SJ, (St Louis: The Institute of Jesuit Sources, 1994). All quotations of General Congregations 24-30 are from this source.

³² GC 27, D. 221, n.1.

³³ GC 27, D. 226, n.3. Again this was with a warning that ‘Ours should beware of involving themselves in the temporal management of those works or in matters of politics.’ (D. 229, n.2).

³⁴ GC 28, D. 29, n. 5 (italics *not* in the original).

³⁵ See GC 28, D. 29, n. 5.

³⁶ GC 23, D. 29, n. 10.

³⁷ Further details of these early developments can be found in Michael Campbell-Johnston, SJ, ‘From *Rerum Novarum* to Decree 4: A brief History’, *Promotio Iustitiae*, 66/1 (1997), 8-14 and

Implementation in this regard proved patchy, however, and in 1949 the Superior General saw the need to address an ‘Instruction on the Social Apostolate’ to the whole Society.

Jean-Baptiste Janssens was, of course, concerned with both spiritual and corporal works of mercy, but he went one step further than previous General Congregations. His ‘Instruction’ defines the social apostolate as procuring ‘an abundance of both temporal and spiritual goods even in the natural order, or at least that sufficiency which man of his very nature needs that he may not feel depressed or looked down upon, nor be exposed to trials and temptations [...]’.³⁸ This clearly hints at an emergent articulation of integral human development. Rather than justice, Janssens prefers to speak of charity and love: genuine compassion can only come from men ‘inflamed with the love of God and of [their] neighbour.’³⁹ Consequently, Jesuits should be trained in active charity through direct action among the poor so as to learn ‘each for himself, to work for the preparation and formation of a better world.’⁴⁰ College and university students also should have direct personal involvement with the poor.

1.2.2 The Second Vatican Council and GC 31

Shortly before the Second Vatican Council, the encyclical *Pacem in Terris* had reaffirmed ‘man’s personal dignity from the standpoint of divine revelation’⁴¹ with the inalienable rights and duties that this entailed. Two years later the Pastoral Constitution *Gaudium et Spes* (GS), considering the signs of the times, presented a clear definition of human beings based on the

Jean-Yves Calvez SJ, ‘From *Rerum Novarum* to Decree 4: In Conclusion, the Evolution’, *Promotio Iustitiae*, 66/1 (1997), 34-39.

³⁸ John Baptist Janssens, ‘Instruction on the Social Apostolate’, *Acta Romana* 12 (1954), n. 7, <http://sjweb.info/sjs/documents/Janssens_eng.pdf> [accessed 11.12.2019].

³⁹ Janssens, n. 8.

⁴⁰ Janssens, n. 8.

⁴¹ John XXIII, Encyclical *Pacem in Terris*: On Establishing Universal Peace in Truth, Justice, Charity and Liberty (Vatican: LEV, 1963), 10.

teaching in Sacred Scripture that ‘man was created “to the image of God”, is capable of knowing and loving his Creator ... by his innermost nature man is a social being, and unless he relates himself to others he can neither live nor develop his potential.’⁴² This interrelatedness has two corollaries: firstly, having been created in the image of God ‘all men are called to one and the same goal, namely God himself’;⁴³ secondly, for this very reason ‘Sacred Scripture ... teaches us that the love of God cannot be separated from love of neighbor: “If there is any other commandment, it is summed up in this saying: Thou shalt love thy neighbour as thyself ... Love therefore is the fulfilment of the Law” (Rom. 13:9-10; cf. John 4:20).’⁴⁴ This does not just provide a clear definition of humankind and the end for which it was created. It is also a reminder of its basic interrelatedness with God and fellow human beings. From this derives what *GS* considers a ‘special obligation ... to make ourselves the neighbor of every person without exception and of actively helping him when he comes across our path’⁴⁵ in accordance with Matt. 25:40.

Human rights are a consequence of the dignity of the human person. They are outlined in both *Gaudium et Spes* and *Dignitatis Humanae* (*DH*)⁴⁶ and promulgated at the same time in 1965. The latter, affirming the growing sense of the dignity of man in contemporary society, professes its belief on the primacy of the human conscience in seeking and embracing the truth. Arguing for freedom of conscience as ‘immunity from coercion in civil society’⁴⁷ *DH* places on the state the obligation to protect the inviolable

⁴² Council Fathers, Pastoral Constitution *Gaudium et Spes*: On the Church in the Modern World (Vatican: LEV, 1965), 12.

⁴³ *GS* 24.

⁴⁴ *GS* 24.

⁴⁵ *GS* 27.

⁴⁶ Council Fathers, Declaration *Dignitatis Humanae*: On the Right of the Person and of Communities to Social and Civil Freedom in Matters Religious (Vatican: LEV, 1965).

⁴⁷ *DH* 1.

rights of all citizens, including that of religious freedom.⁴⁸ This declaration paved the way to Church becoming an advocate of human rights. *Gaudium et Spes* outlines the other rights deriving from the dignity of the human person, from basic necessities to the right to family, education, employment, respect and religious freedom.⁴⁹ Justice as a duty to our neighbour entails the obligation to be proactive: ‘man is defined first of all by his responsibility towards his brothers and toward history.’⁵⁰ This understanding of justice calls upon notions of interdependence, solidarity and reciprocal rights and duties arising from the dignity of all human beings, and a commitment to the common good ‘of the entire human race.’⁵¹ As such, it provides the outline of a definition of human development as a basis for praxis.

The notion of development which underpins *GS* reflects the theories of development of the time, in particular Rostow’s theory. Walt Rostow’s contention was that each country had to go through particular stages of economic development before being fully ‘developed’. Thus with sufficient backing from economically developed nations, ‘underdeveloped’ countries could expect to graduate to higher stages of economic development.⁵² Development in this sense was understood as a purely materialistic process culminating in a high degree of mass consumption. The concept was highly influential in development planning at the time. *GS*, however, wanted to outline a more holistic form of human development, not just material but also cultural, moral and spiritual. Alongside a theology of the human person and the human community it provided a theology of work since ‘by the

⁴⁸ ‘The protection and promotion of the inviolable rights of man ranks among the essential duties of government. Therefore government is to assume the safeguard of the religious freedom of all its citizens, in an effective manner, by just laws and by appropriate means.’ *DH* 6.

⁴⁹ *GS* 26.

⁵⁰ *GS* 55.

⁵¹ *GS* 26.

⁵² Rostow’s model distinguishes between five stages of economic growth: traditional society, preconditions for take-off, take-off, drive to maturity and age of high mass consumption. See Walt W. Rostow, *The Stages of Economic Growth: A Non-Communist Manifesto* (Cambridge: Cambridge University Press, 1960).

homage of work offered to God man is associated with the redemptive work of Jesus Christ.⁵³ It also provided the framework for works of justice and charity: such works must be rooted in fidelity to Christ and his Gospel and based on the workers' conviction that they have much to contribute to the prosperity of mankind and to world peace.⁵⁴

Nonetheless Donal Dorr, in his study of CST, criticized *GS* precisely on the grounds that its understanding of economic development reflects Rostow's theory. He argues, moreover, that although *GS* assumed that economic development would be made available to all, it underestimated two things: the ecological cost of promoting in other regions the type of development that had brought prosperity to the West; and 'the degree to which the extension of "development" to other continents would itself be a form of cultural imperialism ... encouraging an imposition of a product of Western culture which could undermine other cultures.'⁵⁵

The first session of GC 31 (May-July 1965) took place while the Second Vatican Council was also in session. The Council's conclusions were therefore a major influence on its reflections. Following on *GS*, GC 31 expanded Fr Janssens' 1949 'Instruction' into a full Decree, confirming the scope of the social apostolate as

broader ... than the task of exercising our ministries or maintaining social works among workmen or other groups of the same sort that are especially needy. [... } The social apostolate strives directly by every endeavor to build a fuller expression of justice and charity into the structures of human life in common. Its goal is that every man may be able to exercise a personal sense of participation, skill, and responsibility in all areas of community life.⁵⁶

⁵³ Donal Dorr, *Option for the Poor and for the Earth: Vatican Social Teaching*, rev. and expanded edn (Maryknoll, NY: Orbis Books, 2012), pp.171-172.

⁵⁴ Dorr, p. 172.

⁵⁵ Dorr, pp. 172-173.

⁵⁶ GC 31, D. 32, n. 1 in *Jesuit Life and Mission Today: The Decrees of the 31st-35th General Congregations of the Society of Jesus*, ed. by John W. Padberg, SJ (St Louis, MO: The Institute of Jesuit Sources, 2009). All quotations from GC 31 to 35 are from this source.

The sense of the social apostolate as a work of justice as well as love is clearly articulated here. The vision of integral human development also applying to structures of living together is beginning to take shape, together with its building blocks: skills, responsibility, and participation in the life of the community – including, implicitly, political life. GC 31 was careful to warn nonetheless that the social apostolate should not ‘be reduced merely to temporal activity.’⁵⁷ But this already represents a significant shift since GC28 spoke of promoting ‘even the temporal welfare’ of workers. But the expanding definition of the social apostolate meant that new rules of social engagement were going to become inevitable.

1.2.3 *Populorum Progressio* and integral human development

In 1967 the encyclical *Populorum Progressio* (*PP*) further elaborated these themes into a comprehensive definition of human development.

Condemning ‘unbridled liberalism’ and the tendency to focus on economic progress, *PP* considered the various stages of human development consequent upon the Church’s understanding of the human person.

‘Development [...] cannot be restricted to economic growth alone. To be authentic, it must be well-rounded (*integra*): it must foster the development of each man and the whole man’.⁵⁸ Development is something that each person is called to achieve, as an individual and as a member of a community. The development, or ‘humanization’, of each person and the whole person – *integral* development - derives from and returns to spiritual and transcendental capabilities. It is worth differentiating here between spiritual and transcendental because of the widespread contemporary use of the term ‘spiritual’ in particular independently of any religious connotation⁵⁹ as well as the particular understanding of ‘transforming

⁵⁷ GC 31, D. 32, n. 3.

⁵⁸ *PP* 14.

⁵⁹ Philip Sheldrake identifies three main approaches in contemporary literature on spirituality: the holistic (a fully integrated attitude to life), a quest for meaning and a quest for the sacred (this can refer to religious beliefs but also to ‘broad understandings of the numinous [...], undefined depths of human existence or the boundless mysteries of the cosmos.’ *Spirituality: A Brief History* (Chichester, West Sussex: Wiley-Blackwell, 2013), p. 3. Contemporary spirituality, argues

spirituality' promoted by FyA (section 7.4). Transcendental capabilities refer more particularly in this thesis to what Jacques Maritain describes as the quality of a being 'who directly proceeds from human divine creation ... made for truth, capable of knowing God as the Cause of Being, by his reason, and of knowing Him in His intimate life, by the gift of faith.'⁶⁰ *PP* reminds us that born with a supernatural destiny, human beings are responsible for their self-development as they are for their salvation, and fulfilment of this transcendental capability is the pinnacle of integral development.

The different stages of this development entail a transition from less than human to truly human conditions. Truly human conditions involve first of all the satisfaction of basic needs (food, shelter, health); a just society, which implies just structures; and a right to education, information and culture. Only when these conditions are satisfied can a person begin to appreciate their own dignity and that of others. Moral development then leads to a sense of responsibility for the welfare of others, active cooperation to the common good and a desire for peace. Acknowledging God comes next, with faith and unity with Christ as the crowning of human development.⁶¹

After a warning to heed the need for both personal and collective fulfilment and a clear statement of the duties of mutual solidarity, social justice and charity, the encyclical concludes with a call to all leaders of good will and

Sheldrake, 'implicitly suggests an understanding of human identity and of personal development.' As a case in point he quotes UK government documentation for secondary schools which defines spirituality as 'the non-material element of a human being, which animates and sustains us' and promotes its inclusion into the curriculum is 'the development of a sense of identity, self-worth, personal insight, meaning and purpose.' (UK Office for Standards in Education, 2004, quoted in Sheldrake, p. 4) 'Spirituality' is also linked with thriving or a search for thriving as well as a quest for ultimate values. In this sense, concludes Sheldrake, "'spirituality" is self-reflective and also overlaps in significant ways with ethics and moral vision' (p.4) but it is not specifically linked to any religious belief or worldview.

⁶⁰ Jacques Maritain, 'Christian Humanism' in *The Range of Reason* (New York, 1952), pp. 185-199 (p. 196). Karl Rahner speaks in this connection of the human ability to 'experience God's own self.' *Ignatius of Loyola*, ed. by Paul Imhof SJ, trans. by Rosaleen Ockenden (London: Collins, 1979), p. 14.

⁶¹ *PP* 21.

government authorities to ‘draw [their] communities into closer ties of solidarity with all men.’⁶²

This focus on the development of the whole person in relationship with God and neighbour, which relegates economic development to being only one aspect of development, has been hailed as a crucial change.⁶³ John Paul II recognized this when reassessing *PP* twenty years later, noting that ‘the originality of the encyclical consists not so much in the affirmation ... of the universality of the social question but rather in the moral evaluation of this reality.’⁶⁴ *PP* also announces approaches to justice and human wellbeing from CSPraxis to the Capability Approach.

Yet in terms of a practical application, *PP* had its limitations. Gustavo Gutiérrez considered it to be a ‘transitional’ document: it does denounce situations whose injustice cries to heaven, but it does not explicitly call for liberation from oppression. Instead, ‘ultimately it addresses itself to the great ones of this world urging them to carry out the necessary changes. [...] The outright use of the language of liberation, instead of its mere suggestion, would have given a more decided and direct thrust in favor of the oppressed, encouraging them to break with their present situation and take control of their own destiny.’⁶⁵ Meghan Clark, reflecting not on liberation but on the meaning of solidarity, is also uneasy about the idea of change effected from above. Reminding us that solidarity is based on the recognition of equal human dignity and equal universal rights, she argues

⁶² *PP* 83-84.

⁶³ Gustavo Gutiérrez, *A Theology of Liberation: History, Politics and Salvation*, trans. by Sister Carita Inda and John Eagleson (London: SCM Press, 1974) pp.34-35; Dorr, p. 181.

⁶⁴ Pope John Paul II, Encyclical *Sollicitudo Rei Socialis: On The Social Concern* (Vatican: LEV, 1987). Benedict XVI saw *PP* as ‘the *Rerum Novarum* of the present age.’ (Encyclical *Caritas in Veritate: On Integral Development in Charity and Truth* (Vatican: LEV, 2009), 8.

⁶⁵ Gustavo Gutiérrez, pp. 34-35.

that:

rich nations giving aid to developing nations in the form of simple almsgiving or charity [...] does not afford the requisite agency for the presence of solidarity. [...] The virtue of solidarity requires the participation of both the “agent” and those with whom the “agent” seeks to be in solidarity.’⁶⁶

Donal Dorr argues, moreover, that both *PP* and *GS* remain First World documents: they express ‘deep compassion for the poor but no clear indication of solidarity with them ... as though they are looking at the poor from the outside.’⁶⁷ It would then have to be the task of individual regions to consider solidarity with the poor from the inside. For the Latin American Church this was going to mean accepting the responsibility for change by ‘[making] ours their problems and their struggles.’⁶⁸

1.2.4 Latin American contextualization: the Medellin Conference

A perfect example of contextual theology, the adaptation of the Council’s teachings and *PP* by the Conference of Latin American Bishops (CELAM) opened new perspectives with unexpected implications. In the wake of the 1948 revolution in China and the 1965 Marxist victory in Cuba, widespread social injustice and abject poverty throughout Latin America meant that on that continent particularly, Marxism suddenly appeared to be a very real threat. Neoliberal development initiatives – *desarrollismo* – had not addressed the roots of poverty and had thus done little to improve the lives of the vast majority of people. The dependency theory grew as an answer to Rostow’s theory of development. It pointed out that Latin America exported cheap primary goods and imported more expensive products, often manufactured from these very primary goods. By so doing, it argued, Latin

⁶⁶ Meghan Clark, *The Vision of Catholic Social Thought: The Virtue of Solidarity and the Praxis of Human Rights* (Minneapolis: Fortress Press, 2014), p. 112.

⁶⁷ Dorr, pp. 165-66.

⁶⁸ *Second General Conference of Latin American Bishops: The Church in the Present-Day Transformation of Latin America in the Light of the Council, II: Conclusions*, Official English Edition ed. by Louis M. Colonnese (Washington D.C: US Catholic Conference Publications Office, 1968), 4.10, p. 217.

American countries benefitted richer nations and increased their own dependency on these nations.⁶⁹ The dependency theory gained ground in the 1960s as an explanation for the grinding poverty of much of the continent, and was proposed by Gutiérrez as an explanation of social injustice.⁷⁰ Thus for political and economic as well as pastoral reasons, the Church was acutely aware of the need to devise solutions specifically suited to its own context.⁷¹

Taking *PP* as the basis for its reflection and the analysis of its own reality, CELAM's 1968 Medellín conference considered the causes of poverty rejecting, like the encyclical, both Marxism and neoliberal capitalism as possible solutions. Defining the search for justice as a requirement of biblical teaching, it declared that love for Christ and fellow human beings would 'not only be the great force liberating us from injustice and oppression, but also the inspiration for social justice, understood as the whole of life and as an impulse towards the integral growth of our countries.'⁷² Injustice and oppression were defined as 'structural sin': a break from God which both faith and justice must confront. Medellín fully embraced the concept of integral development for all according to a programme of *humanización* – progression from less human to more human conditions for the suffering masses, as defined in *PP*. For Medellín and later liberation theologians, God at that time in Latin America spoke through the poor. Certainly Medellín was clear that the peasant and indigenous populations, as the poorest of the poor, were at the top of its agenda. Gutiérrez, who had influenced the thinking of the Bishops at Medellín and the wording of its concluding documents, further elaborated both on the notion of systemic sin and the need for liberation, and the threefold role of the Latin American Church at that juncture. This was comprised of

⁶⁹ A full account of the dependency theory can be found in Raul Prebisch, 'The economic development of Latin America and its Principal Problems', *Economic Bulletin for Latin America*, 7/1 (1962), 1-23.

⁷⁰ Gutiérrez, p. 109.

⁷¹ Dorr, p. 166.

⁷² *Med.* 1.5, pp. 59-60.

prophetic denunciation of social ‘sinful situations’, solidarity with the oppressed, and a ‘conscientizing evangelization’ achieved by fulfilling ‘the duty to educate the Christian conscience, to inspire, stimulate, and help orient all the initiatives that contribute to the formation of man.’⁷³

The concept of humanization recurs several times in Medellín’s Documents, with a call to eliminating less than human conditions. Medellín’s strategy of choice to achieve this was the ‘conscientisation’ – socio-political awareness-raising – and organization of ordinary people. And conscientisation is an essential component of education. Education in this context goes well beyond literacy. Its aim, as Paulo Freire explained, is to enable the poor to become agents of change and the subjects of their own development – a concept fully endorsed by Medellín as *educación liberadora*. Only this sort of education could promote liberation from less than human conditions, and it was the Church’s duty to support it in its pursuit of peace and justice.⁷⁴ The bishops recognized the possibility of tensions arising from this approach. But they considered that there could be no peace without social justice.

This radical stance was, on the face of it, a spectacular break with tradition. The question was, however, how to achieve this ambitious programme. The tension between the analysis of the shameful injustice on the one hand and the uncomfortable possibility of confrontation with powerful elites on the other, is palpable here as in other documents of the magisterium from that period.⁷⁵ The choice between contrasting ideologies, and between political

⁷³ Gutiérrez., p. 69. To this agenda Gutiérrez added the need to tackle what he considered to be inadequate Church structures.

⁷⁴ ‘It is indispensable to form a social conscience and a realistic perception of the problems of the community and of social structures. We must awaken the social conscience.’ (*Med.* 1.17, p. 65).

⁷⁵ Dorr, tracing the question of confrontation and conflict in CST, notes that for *PP* change seemed to be expected to come from the upper echelons of society. Medellín – and liberation theology – present a radically different possibility of transformation and raise the possibility of confrontation. Dorr argues that both *PP* and *Octogesima Adveniens*, Pope Paul’s answer to Medellín, place much emphasis on consensus. Thus they overlook the positive value of at least some degree of confrontation which may be the only way to establish equality between rich and poor. (Dorr, pp. 197-8).

solutions and the use of violence, was to plague liberation theology for years to come. CELAM opted for a less controversial route. Pointing out that the Christian message calls for conversion and not a change of structures, it built instead on *PP*'s notion of justice as integral human development but shifted the onus for achieving it. It chose to put its trust in the possibility of achieving social transformation by educating individuals to become agents of change. Paulo Freire's pedagogy, based on raising the awareness of learners from the oppressed masses, had been developed precisely for that purpose. Medellín opted for this path to social change, leaving the responsibility for self-development and social change to the individual.

At first sight this position is very different from *PP*'s top-down approach of asking leaders and governments to be the agents of social change.

Concientización – awareness-raising – seems to imply that the poor should instead take on this role. In actual fact, Medellín's thinking on this point is somewhat ambiguous. It takes the view that the poor (it does not call them 'the masses') can only be 'conscientized' by an elite, and it calls upon this - 4 elite to lead the process as part of Christian witness. This dichotomy regarding 'mass-man' and the elites, both in terms of the Christian message and in terms of social transformation and a liberating education, is a problematic issue which extends, as we shall see, even to Freire's work of conscientisation and *educación liberadora*. As such Medellín's call to an elite can be argued to reaffirm the stark differences of Latin American society, unwittingly perpetuating the very divisions that it tries to solve.

In spite of the considerable doubts of more conservative bishops in intervening years,⁷⁶ CELAM's 1978 Puebla conference pursued the same

⁷⁶ The 1968 Medellín Conference lay the ground for liberation theology and was followed by the publication in 1971 of Gustavo Gutiérrez's *A Theology of Liberation: history, politics and salvation*, trans. and ed. by Sister Caridad Inda and John Eagleson (Maryknoll, NY: Orbis Books, 1973) and in 1972, by Leonardo Boff's *Jesus Christ Liberator: Critical Christology of Our Time*, trans. by Patrick Hughes (Maryknoll, NY: Orbis Books, 1979). However, in 1972 Cardinal Alfonso López Trujillo was elected general secretary of CELAM. He was highly influential in containing further moves towards liberationist ideals at the 1972 CELAM conference in Sucre. Liberation theology was nonetheless spreading rapidly in Latin America, with such works in 1975 as Juan Luis

approach: whilst Medellin had formulated the notion of structural sin, it was Puebla that coined the phrase of a ‘preferential option for the poor’. In the face of overwhelming social injustice, the Latin American bishops and theologians in their final document thus opted for prophetic denunciation, performative faith and full engagement in social action as ‘constitutive’ elements of preaching the Gospel. Yet one passage from the Puebla *Conclusions* highlights the dilemma between this position and the spiritual role of the Church:

The situation of injustice ... forces us to reflect on the great challenge our pastoral work faces in trying to help human beings to move from less human to more human conditions. [...] And the unjust social situation has not failed to produce tensions within the Church itself. On the one hand they are provoked by groups that stress the “spiritual” side of the Church’s mission and resent active efforts at societal improvement. On the other hand they are provoked by people who want to make the Church’s mission nothing more than an effort at human betterment.⁷⁷

Segundo’s *The Liberation of Theology* [trans. by John Drury (Maryknoll, NY: Orbis Books, 1976)] and in 1976 Jan Sobrino’s *Christology at the Crossroads: A Latin American Approach* [trans. by John Drury (Maryknoll, NY: Orbis Books, 1978)]. The next CELAM conference in Puebla (1979) was opened by Pope John Paul II with a speech which was conciliatory in tone but urged adherence to the Church’s social teaching. However, a number of liberation theologians (including Gutiérrez) were barred from attending the conference. Within hours of the Pope’s speech they circulated a twenty-page refutation which had some influence on the eventual outcome of the conference, including support for a ‘preferential option for the poor.’ Christian Smith, in his comprehensive history of the development surrounding the emergence of liberation theology, claims that a quarter of the final documents of the Puebla conference were drafted by theologians who had not attended the conference. See Christian Smith, *The Emergence of Liberation Theology: Radical Religion and Social Movement Theory* (Chicago: University of Chicago Press, 1991), p. 221. Details on the work of the theologians in the first phase of liberation theology and the tensions within the Church until the Puebla conference can also be found in *Liberation Theology: A documentary History*, ed. with introduction, commentary and translation by Alfred Thomas Hennelly (Maryknoll, NY: Orbis Books, 1992);

⁷⁷ *Third General Conference of Latin American Bishops, Puebla: Evangelization at Present and in The Future of Latin America: Conclusions*, Official English Edition (Middlegreen, Slough: St Paul’s Publications, 1980), 90, p. 48-49. The text goes on to deplore the ‘partisan political activity of priests’ and their tendency to apply ‘social analyses with strong political connotations to pastoral work’, highlighting by contrast the efforts for social justice made by the Church in Latin America in the previous ten years (91-92, p. 49). Both the adoption of the preferential option for the poor and the concern regarding any ‘partisan activity’ reflect the tensions between conservative and radical approaches in the Latin American Church at the time. The later evolution of liberation theology following the Puebla conference is mapped in Alfred T Hennelly (ed.), *Santo Domingo and beyond: Documents and Commentaries from the Fourth General Conference of Latin American Bishops* (Maryknoll, NY: Orbis Books, 1993). These developments are also analyzed as part of the continuous evolution of CST in Donal Dorr, *Option for the Poor and for the Earth: A Hundred Years of Vatican Social Teaching*, rev. edn (Dublin: Gill and Macmillan, 1992).

1.2.5 *Justice in the World*

In Rome, the same message of justice as a consequence of love of God and love of neighbour was reiterated by the 1971 Synod of Bishops *in Justice in the World*: ‘love implies an absolute demand for justice, namely a recognition of the dignity and rights of one’s neighbour. Justice attains its inner fullness only in love.’⁷⁸ For Christians, this entails a duty to take action in order to ensure that the Christian message of love and justice is implemented, a duty presented as ‘a constitutive dimension of the preaching of the Gospel or, in other words, of the Church’s mission for the redemption of the human race and its liberation from every oppressive situation’,⁷⁹ a statement which provoked much controversy.⁸⁰ The document affirms the need for solidarity with the poor, but also a duty to redistribute resources so as to give preference to the poorest. The document insists on structural injustice as being a hindrance to the conversion of hearts. The Synod’s conclusions complete both *PP* and *Medellin* on two important points. Firstly, they unequivocally condemn resorting to violence to achieve change which *PP*, calling for reform rather than revolution, had not felt the need to state explicitly. Secondly, they describe the role of education in terms

⁷⁸ Synod of Bishops, Second Ordinary General Assembly, *Justice in the World* (Washington D.C.: US Catholic Conference Publications Office, 1972), 34.

⁷⁹ *Justice in the World*, 6.

⁸⁰ This important inclusion, a year before GC 32, already made the promotion of justice an absolute requirement of faith for all Christians. The statement proved controversial because the exact scope of ‘constitutive’ was open to question, as was the nature of justice and the meaning of ‘liberation’ at a time when liberation theology was becoming popular in Latin America. The controversy spilled over into the following Synod in 1974. Pope Paul VI’s gives his own answer to the debate in *Evangelii Nuntiandi*: ‘Above all the Gospel must be proclaimed by witness [...] this witness which involves presence, sharing, solidarity, and which is an essential element, and generally the first one, in evangelization. [...] Nevertheless [...] even the finest witness will prove ineffective in the long run if it is not explained, justified [...] and made explicit by a clear and unequivocal proclamation of the Lord Jesus.’ *Evangelii Nuntiandi*: On the Proclamation of the Gospel (Vatican: LEV, 1976), 21-22. For a further analysis of *Justice in the World*, its aftermath and the Pope’s response see Donal Dorr, *Option for the Poor*, pp. 202-219.

clearly reminiscent of Medellin:

In the developing countries, the principal aim of this education to justice consists in an attempt to awaken consciences to a knowledge of the concrete situation and in a call to secure a total improvement; by these means the transformation of the world has already begun.⁸¹

Responsibility for social transformation here is no longer presented as the task of leaders and governments. Instead the accent is on the downtrodden to become agents of change. In this consideration of IHD as a work of justice, three interconnected themes are emerging as essential, interconnected building blocks: education, agency and participation.

Pedro Arrupe, the Father General at the time, had been involved in raising awareness of situations of injustice both within the Society of Jesus and without and had a significant influence on the 1971 Synod of Bishops. He was familiar with the Latin American context and had been an outspoken proponent of social justice in presentations and documents ranging from his 1966 address to Latin American Provincials⁸² to the 'Men for Others' speech to Jesuit alumni in Valencia. The latter brought together the spirit of Medellin and the teaching of the Synod in words that announce Decree Four: 'participation in the promotion of justice and the liberation of the oppressed is a constitutive element of the mission which Our Lord has entrusted to [the Church].'⁸³ Thus the conclusions of the 32nd General Congregation, discerning the same signs of the times through the same lens, were in many ways the natural continuation of these developments both in the Church and in the Society.

⁸¹ *Justice in the World*, 51-52.

⁸² Pedro Arrupe's 1966 'Letter to the Provincials of Latin America', and the subsequent meeting just a few months before Medellin, analysed the reality of Latin America in the light of *PP* and recommended the need for a prophetic Church denouncing an unjust social order. Letter trans. with introduction by Gaspar F. LoBiondo SJ, *Woodstock Letters*, 97/1 (1968), 67-79.

⁸³ Pedro Arrupe, SJ, 'Men for Others: Training Agents of Change for the Promotion of Justice (1973), in *Justice with Faith Today: Selected Letters and Adresses*, ed. by Jérôme Aixala, 3 vols, II (St Louis: The Institute of Jesuit Sources, 1980), pp. 123-138 (p. 124).

1.2.6 GC 32: faith, justice and love

Such then was the background to GC 32, which met in December 1974 to discuss the challenges of the time. Following GC 31, divisions between those who resisted new ways and those who were too ready to ‘accommodate themselves and their work to the needs of the world’⁸⁴ were perceived as a danger to the unity of the Order. Another element was also part of the change: the 1965 Decree *Perfectae Caritatis*. The Decree encouraged religious congregations constantly ‘to return to the sources of all Christian life and to the original spirit of the institutes and their adaptation to the changed conditions of our time.’⁸⁵ The latter demanded that religious should have ‘an adequate knowledge of the social conditions of the times they live in.’⁸⁶ The task of GC 32 was thus to achieve ‘a balanced renewal of religious life and a discerning rededication to apostolic service.’⁸⁷

In response, the Society went back to principles underlying its foundation as a priestly, apostolic body as laid out in the 1540 bull *Regimini militantis ecclesiae* and later revised in *Exposcit debitum*. Defining the most crucial contemporary struggle as one for faith and for justice, it declared its engagement under the standard of the Cross. Asking in this optic what it had done for Christ, was doing for Him and was going to do for Him, it opted unequivocally to participate in this struggle for faith and justice.⁸⁸ It thus integrated the discernment of mission as articulated by the first Jesuits and the particular concept of social justice of its own time. Decree Four famously proclaimed that ‘the mission of the Society of Jesus today is the

⁸⁴ GC 32, D 1, n. 3.

⁸⁵ Council Fathers, Decree *Perfectae Caritatis*: On the Adaptation and Renewal of Religious Life (Vatican: LEV, 1965), 2. As part of reading the signs of the time, the Decree requested that religious orders should be aware of social conditions and the needs of the Church, so that ‘judging current events wisely in the light of faith and burning with apostolic zeal, they may be able to assist men more effectively.’ (PC 2).

⁸⁶ PC 2.

⁸⁷ GC 32, D. 1, n. 5.

⁸⁸ GC 32, D. 2, nn. 2-3.

service of the faith, of which the promotion of justice is an absolute requirement.’⁸⁹

Prima facie this was totally in line with the Formula’s commitment to the propagation of the faith and works of charity. It was also a confirmation of the understanding of the social apostolate articulated by GC 31. But there was no escaping a notion of injustice understood both as personal and as ‘built into economic, social, and political structures.’⁹⁰ Promoting justice thus came with the inevitable challenge of transforming these structures ‘in the interest of the spiritual and material liberation of fellow human beings’⁹¹ as part of evangelization. And this dimension of social justice, added Decree Four, should be integrated into all Jesuit ministries.⁹²

There was little likelihood that this would build a bridge between those in the Order who resisted renewal and those ‘seeking new orientations.’ The formulation of promoting justice as an *absolute requirement* of faith in Decree Four meant that from then on, ‘neither can there be service to faith that does not include the promotion of justice, nor a promotion of justice that is not rooted, motivated, and directed by faith.’⁹³ Decree Four offers no precise definition of justice, nor does it specify the type or the extent of the structural transformation envisaged. Therein lay a problem. Responding to the needs of the poor and the spirit of poverty were part of the original charism of the Society. But in an age when position in the social order was accepted as divinely ordained Ignatius had not questioned the root causes of poverty or injustice. The implications of Decree Four were huge, and potentially in direct contradiction with the repeated admonitions of the past not to get involved in temporal or political affairs. It raised questions regarding the nature of the Jesuit mission and in particular the exact balance

⁸⁹ GC 32, D. 4, n. 2.

⁹⁰ GC 32, D. 4, n. 6.

⁹¹ GC 32, D. 4, n. 40.

⁹² GC 32, D. 4, n. 47.

⁹³ Josep M. Rambla SJ, ‘Ignatian spirituality from the perspective of social justice’, *Promotio Iustitiae* 119/3 (2015), 7-23 (p. 12).

between spiritual and temporal duties within the social apostolate, where Ignatius had always recommended primacy of the spiritual. In this preferential focus on the poorest in society, in this presentation of the social apostolate as active involvement in temporal matters, in the recommendation to challenge social structures which bred injustice, some even detected a whiff of Marxism.

Jesuit and other scholars focussed on the biblical underpinning of faith and justice in an attempt to clarify the precise meaning of the latter and justify its use in the contemporary context.⁹⁴ But even this work of explanation and biblical justification did not entirely succeed in allaying the fears of those who felt that Decree Four was straying into dangerous territory and betraying the original, priestly and apostolic Jesuit mission. A more convincing approach maybe was to return to Ignatius's vision of love of God and neighbour as both the source of mission and the social teaching of the Church, and ground Decree Four firmly as an *aggiornamento* of that tradition. Jean-Yves Calvez opted for this approach. He proposed a clear definition of injustice – ‘humanly intolerable situations’⁹⁵ that cry out to heaven – caused by personal and institutional sin. Following this premise he refuted the accusation of Marxist influence in Decree Four on two grounds. Firstly, Decree Four plainly attributes injustice to individual and structural sin, a Christian understanding which steers us away from purely socio-economic explanations and possible hints of class struggles. Secondly, whilst Decree Four refers to human justice it aims explicitly for ‘the perfect justice of the Gospel’, thus opening up on forgiveness, reconciliation, mercy: ‘There can be no promotion of justice in the full Christian sense unless we also preach Jesus Christ and the mystery of reconciliation which he brings.’⁹⁶ Perfect justice, however, is unattainable. It can only be

⁹⁴ See in particular *The Faith that Does Justice: Examining the Christian Sources for Social Change*, ed. by John C. Haughey SJ (Eugene, OR: Wipf and Stock, 2006).

⁹⁵ GC 32, D. 4, n. 27.

⁹⁶ GC 32, D. 4, n. 27.

imitated, by ‘being just as God Himself is just’.⁹⁷ Decree Four thus aims not just for the Gospel’s perfect justice, but also for ‘imitating God’s justice which gratuitously justifies the sinner.’⁹⁸

Herein lies the connection between justice and charity which, Calvez argues, is stated quite plainly in Decree Four itself: ‘There is no genuine conversion to the love of God without conversion to the love of neighbour and, *therefore*, to the demands of justice.’⁹⁹ Working for justice, comments Calvez, is thus ‘an integral part of loving one’s neighbour. Love demands it.’¹⁰⁰ This is the crux of the matter, quite plain in Decree 4 but, he admits, not fully elaborated and as a result, sometimes overlooked. Yet a full appreciation of the connection between justice and love was crucial. This is why Arrupe, concerned at the misunderstandings in this connection, began preparing a text on charity at the same time as Pope John Paul II was working on an encyclical on mercy.

Dives in misericordia was published in 1980. Having established the central place of God’s mercy in Christian revelation the Pope reflects on the problems of his day, dwelling on Jesus’s teaching mission to the poor, the victims of social injustice and sinners. He concludes that justice by itself is not enough. The Parable of the Prodigal Son is an example of how merciful love transcends justice when mere justice proves too narrow : ‘Love is greater than justice ... Love, so to speak, conditions justice and, in the final analysis, justice serves love.’¹⁰¹

⁹⁷ Calvez, *Foi et justice: la dimension sociale de l’évangélisation*, Collection Christus 58 (Paris: Desclée de Brouwer, 1985), p. 92. Translations from French and Spanish are the researcher’s.

⁹⁸ Calvez, *Foi et justice*, p. 92.

⁹⁹ GC 32, D.4, n. 28 (italics added by Calvez in his quotation of this passage, *Foi et Justice*, p. 90).

¹⁰⁰ Calvez, *Foi et justice*, p. 95.

¹⁰¹ John Paul II, Encyclical *Dives in Misericordia: Rich in Mercy* (Vatican: LEV, 1980), 4. Later encyclicals, such as *Caritas in Veritate* and *Deus Caritas Est* have continued to emphasise charity over justice as being ‘at the heart of the Church’s social doctrine.’

In his 1981 conference ‘Rooted and grounded in love’ Arrupe uses this very quotation, as well as the 1971 Bishops’ Synod statement that love of neighbour and justice are inseparable. For him, the promotion of justice is essential precisely because it marks the beginning of the love of neighbour. Yet he also reaches the same conclusion that justice by itself is not enough, and must be surpassed by charity : ‘Charity gives justice its transcendental and inner dimension ... love has no borders because it reproduces on a human scale the infinity of God’s essence and makes each man, our brother, the object of unlimited service on our part.’¹⁰² Developing like *DM* the theme that legally enforceable justice is limited and only love can turn into a deeper, superior justice, Arrupe concludes that this was precisely the meaning of GC 32: at the root of everything is love, and ‘real justice comes from love and culminates in love.’¹⁰³ This was duly confirmed by GC 33 who stated that the service of faith and the promotion of justice are ‘but a single commitment which finds its coherence and deepest expression in that love of God and love of neighbour to which God calls us in the One Great Commandment. One cannot act justly without love.’¹⁰⁴ And GC 33 recognized that in this connection, the Order had ‘not learned to enter fully into a mission which is not simply one ministry among others, but the integrating factor of all our ministries.’¹⁰⁵

In turn GC 34 placed the promotion of justice as part of the service of faith within the traditional concept of Jesuit mission, arguing that ‘this description of the main focus of our work and spirituality and its integrating principle is grounded in the Formula of the Institute’.¹⁰⁶ Focussing on the dimensions of the Jesuit mission in Decree 2 it emphatically confirmed its

¹⁰² P. Arrupe, quoted in Calvez, *Foi et justice*, pp. 100-1.

¹⁰³ P. Arrupe, quoted in Calvez, *Foi et justice*, p. 104.

¹⁰⁴ GC 33, D. 1, n. 42.

¹⁰⁵ GC 33, D. 1, n. 33, quoting GC 32, D 4, n. 18.

¹⁰⁶ GC 34, D. 3, n. 6.

endorsement of Decree Four:

We reaffirm what is said in Decree 4 of GC 32: “The service of faith and the promotion of justice cannot be for us simply one ministry among others. It must be the integrating factor of all our ministries; and not only of our ministries but also of our inner life as individuals, as communities, and as a worldwide brotherhood.” The aim of our mission received from Christ, as presented in the Formula of the Institute, is the service of faith. The integrating principle of our mission is the inseparable link between faith and the promotion of the justice of the Kingdom.¹⁰⁷

The dimensions required for the promotion of justice now include the whole range of integral human development as outlined in *PP* and reaffirmed in later encyclicals. This covers what are now considered human rights: the basic necessities of life and well-being; personal rights such as freedom of conscience and expression and the right to practice and share one’s faith; civil and political rights to participate fully and freely in the processes of society; and rights such as development, peace, and a healthy environment. Individuals and communities are seen as intertwined. Consequently, justice demands that both individual and collective rights should be respected, in particular the preservation of culture and the right for peoples to have ‘control of their own destiny and resources.’¹⁰⁸ The understanding of development – and justice – here has evolved in line not just with CST, but with the secular articulation of human rights, human development and justice.

For the theologian Peter Bisson, examining the developments since GC 31 in the light of Bernard Lonergan’s theology, GC 31 already represented a major shift in the Society’s approach. In an institution traditionally focussed on the transcendent, GC 31 had sought to adapt Ignatian norms to contemporary needs. Commenting on Decree 23, Bisson notes tensions between the spiritual and the temporal ‘that would later become on ongoing

¹⁰⁷ GC 34, D. 2, n. 14.

¹⁰⁸ GC 34, D. 3, n. 6.

dialectic in the development of constitutive religious meaning after the council.¹⁰⁹ Bisson follows that dialectic between religious vocation and involvement in the world through the following General Congregations. In GC 32 it is the service of faith, still preeminent as the goal of mission, which gives rise to energy in the dialectic between the spiritual and social involvement. Regarding Decree 4, n.18, where again the justice of the Gospel is tied to the willingness to work actively to secure it, Bisson writes that justice and the social dimension contribute to the construction of religious meaning to the extent that they have ‘become a constitutive dimension of mission.’¹¹⁰ For Bisson, GC32

firmly established theoretical consciousness at the constitutive level of meaning, which in turn set up dialectical relationships within religiously differentiated consciousness and common sense, with each making incompatible claims as regards constitutive religious meaning. [...] This suggests a conversion in Lonergan’s sense.¹¹¹

The new social dimension thus becomes the foundation of new developments, ‘including the provision of renewed vigour to the dialectic between faith and justice.’¹¹² Bisson then follows the development of the dialectic in subsequent General Congregations. GC33 ‘responded to the post-GC32 dialectic between faith and justice by reiterating the spiritual unity of Jesuit mission.’¹¹³ GC 34 makes it clear that Christ, and not the Society, is the primary agent of mission. From GC 34 the world is no longer ‘out there’: the Society contemplates the Word becoming incarnate and acting there.

¹⁰⁹ Peter Bisson SJ, ‘The Postconciliar Jesuit Congregations: Social Commitment Constructing a New World of Religious Meaning’, ed. by Fred Lawrence, *Lonergan Workshop*, 19 (2007), 1-35 (p. 11).

¹¹⁰ Bisson, p. 20.

¹¹¹ Bisson, p. 20 This is a clear echo of the disputed declaration of the *Justice in the World* document describing justice as a constitutive element of evangelization.

¹¹² Bisson, p. 21

¹¹³ Bisson, p. 28.

Arguing that the relationship between the terms of faith and justice is but a heuristic device – a concept put forward to facilitate analysis - Bisson sees a shift whereby social justice now becomes the orienting dimension of mission: ‘justice’ has become the shorthand for proactive engagement in the world. Reading the signs of the times means ‘examining contemporary social trends and transformations for the activity of God and hearing an invitation from God to participate in saving the world.’¹¹⁴ But the questions posed by GC 34, he concludes, are: what is Christ doing in our world? How do we join in? And how do we know? GC 31, 32 and 33 had asked the first kind of question (moral), but from GC 34 the questions asked are religious questions that require religious answers. The dialectic has thus been resolved.

This interpretation of the faith-justice relationship establishes the coherence in the development in Jesuit thinking since the Council. Its focus on the nature of Jesuit mission and on the interiority of the human agents of mission offers a valuable insight into the process of conversion and transformation within the Society of Jesus since GC 31. But it does not fully convey a sense of the divisions and conflicts that it sparked. The new mission, even as love of God and neighbour, proved hugely divisive, and nowhere more so than in Latin America in the heyday of liberation theology. The Jesuits in that region, writes Jeffrey Klaiber, became ‘leading protagonists of social and political change’¹¹⁵ focussing on inculturation, the defence of marginalized groups and indigenous rights and a new understanding of human development. Yet as part of the new focus on social transformation this led to major tensions within the Order and a considerable number of defections.

Bisson also seems to take for granted the fact that ‘conversion’ has now occurred throughout the Society. The example of Ecuador will show that

¹¹⁴ Bisson, p. 31.

¹¹⁵ Jeffrey Klaiber, *The Jesuits in Latin America, 1549-2000: 450 Years of Inculturation, Defence of Human Rights and Prophetic Witness* (St Louis: The Institute of Jesuits Sources, 2009), p. 23.

this is not necessarily the case. And if conversion is still not complete, how should injustice built into economic, social and political structures be confronted? How is a liberating education, which Medellin and the 1971 Synod saw as essential for social justice, to be approached? There is no blueprint for action. Decisions on where, when and how to act must then be the outcome of a process of discernment rooted in the *Spiritual Exercises*. Inasmuch as discernment is carried out at community level and the process of conversion outlined by Bisson has not affected all in the same way, tensions remain inevitable.

1.3 The case of children

The aim of this chapter was to outline the Jesuit understanding of mission and its evolving sense of justice in parallel to CST as a prelude to exploring the integration of the social and education apostolates and the implications for the praxis of educating children in need. What does CST – and the Society – tell us about children?

The *New Dictionary of Catholic Social Thought* contains an article on ‘Children, Rights Of’.¹¹⁶ Christine Gudorf deplores the lack of developed treatment of children’s rights in social teaching, although she argues that these can be inferred from a variety of documents. They include the right to life of the unborn, the right to full-time care by mothers, to adequate material support and protection, to education and culture. All these rights are presented as ‘morally binding on the state’,¹¹⁷ although it is unclear how states with insufficient resources should prioritize. Gudorf notes the complete absence of any teaching on the dignity of children or the limits of parental authority ‘due to a failure to recognize children as capable of participating in responsible decision making.’¹¹⁸ She sees this failure as a direct contradiction with the sacramental framework of the Church

¹¹⁶ Christine E. Gudorf, ‘Children, Rights Of’ in *The New Dictionary of Catholic Social Thought*, ed. by Judith A. Dwyer (Collegeville, Minnesota: The Liturgical Press, 1994), pp. 143-148.

¹¹⁷ Gudorf, p. 145.

¹¹⁸ Gudorf, p. 147.

(reconciliation, confirmation) which does recognize children's ability to make responsible moral decisions from a relatively early age.¹¹⁹

This lack of recognition of children's dignity and agency in both CST and the modern philosophical discourse about justice has also been explored by Ethna Regan: 'children are barely visible in most contractarian accounts of justice, as are the poor, thus moving towards invisibility those who are both child and poor.'¹²⁰ Regan maintains that, similarly, there are few references to children in CST. The most extensive discussion, in *Evangelium Vitae*, focuses largely on the unborn child. There is thus an urgent need to 'highlight the disparity between the theological dignity and high visibility given to the unborn child, in comparison with the less developed analysis of the other forms of violence against the lives of children.'¹²¹ *Caritas in Veritate* makes scant referencing to children, in spite of the centrality of children in the Millennium Development Goals. Yet injustice against children, and poor children in particular, is 'perhaps, the most serious ethical challenge facing the contemporary Church'.¹²²

The limited attention given to children in general and poor children in particular, makes them a highly vulnerable group. The Church is beginning to try and address this problem. The 2018 Synod on Youth was convened with the aim of listening to young people. Defining 'the young' as a *locus theologicus*, it focussed on accompaniment, sexual morality, the role of women and social justice.¹²³ But the Synod explicitly refers to young people aged 16-25, of whom only a small proportion can be described as children. In spite of its enormous importance in recognizing the needs and aspirations of a key section of society for the future of

¹¹⁹ In canon law, a child is considered to have attained the 'use of reason' and begins to have moral responsibility by the age of seven. Children can receive confession and Holy Communion from that age and are bound to attend mass on Sundays and days of obligation. (*Code of Canon Law*, canon 97 para. 2).

¹²⁰ Ethna Regan, 'Barely visible: The Child in Catholic Social Teaching', *Heythrop Journal* 55/6 (2014), 1021-2032 (p. 1021).

¹²¹ Regan, p. 1027.

¹²² Regan, p. 1029.

¹²³ Synod of Bishops, Fifteenth Ordinary General Assembly, *Young People, The Faith and Vocational Discernment* (Vatican: LEV, 2018).

the Church, the Synod did not really dwell on social inequality, violations of human rights or dignity, or discrimination. The same critique applies to the Society's third Universal Apostolic Preference (UAP): 'to accompany young people in the creation of a hope-filled future.'¹²⁴ The age group concerned is not specified here but there is no reason to suppose it is different from that considered by the Synod, and the approach is indeed in line with the Synod's conclusions. The third Apostolic Preference focuses on accompanying the young in making fundamental decisions, teaching them discernment – the *Spiritual Exercises* being the ideal tool to achieve this – and sharing the Good News. It suggests teaching them the meaning of true freedom and finding God in all things. In other words, it considers young people only as they acquire what Martha Nussbaum would call the autonomy and agency to make life plans. In this sense neither the Synod nor the UAP have much to contribute to the discourse on children's rights, dignity and agency. Children – certainly children under 16 – are invisible still in these documents.

Yet the promotion of justice requires that integral human development, based on an education that favours the expansion of the learner's whole potential, be provided for the most vulnerable. The third UAP is sensitive to the deprivation the young can suffer, but it does not touch on expanding their rights or their capabilities other than transcendental. For this we have to turn to the second UAP – closeness with the poor: a path that 'promotes social justice and the change of economic, political, and social structures that generate injustice ... a necessary dimension of the reconciliation of individuals, peoples, and their cultures with one another, with nature, and with God.'¹²⁵ In this connection a special place is to be given to caring for indigenous peoples, their cultures and their basic rights. Education as such is not mentioned, presumably because it is considered as a ministry already pursued. In view of the current emphasis of international ONGs on delivering quality education for all, a more explicit focus would have been welcome.

¹²⁴ Society of Jesus, *Universal Apostolic Preferences* (Rome: Jesuit General Curia, 2019), third preference.

¹²⁵ UAP, Second Preference.

As increasingly recognized by the international community, children suffer more than any group from poverty and discrimination. These are painful and unjust in the present and stunt their growth and potential at every level, for life. Poor marginalized children, especially in remote rural areas, are the frontier and their education must be a priority. It is a work of social justice *par excellence*. In this connection, Regan refers to the many Church agencies working to relieve ‘less than human’ conditions for the most vulnerable children, an experience ‘which could be harvested to develop a more explicit and coherent treatment of the issue of justice for children.’¹²⁶ Thus in order to find and evaluate the praxis of mission and social justice with young children and adolescents in less than human conditions, it is to the long experience and well-established practices of Catholic agencies and religious orders such as the Society of Jesus that we must turn.

1.4 Conclusion

Ignatius is credited with first using the word ‘mission’ in the sense of being sent as Jesus was sent. The object of mission was articulated in the First Formula of the Institute, which established the purpose of the new Society of Jesus as the propagation of the faith through the *Spiritual Exercises* and works of charity, in particular the education of children and the illiterate in Christian doctrine. Later versions of the Formula as well the *Constitutions* expanded on these aims, adding the defence as well as the propagation of the faith and teaching among other works of charity. But texts alone are not sufficient to define the whole work of the early Society, especially the cultural and civic dimension of its charism. The same comment applies to the evolution of the Society’s understanding of its mission in the last 130 years. General Congregation documents and scholarly commentaries reveal transformation at the same time as they emphasise continuity. But they do not always reflect how messy, indeed painful, the transition to a more proactive involvement in social justice issues has been at times. Ultimately, only a focus on the praxis since GC 32 can provide more than a theoretical appreciation of its

¹²⁶ Regan, p. 1031.

vision. There could be no better choice for this than a focus on promoting justice as part what O'Malley has described as the first ministry of the Society: education.

Chapter 2. The ministry of education

Characteristics, successes and challenges

The First Formula of the Institute, which saw as a special work of charity the teaching of catechism to children and the unlettered in Christianity, contained from the outset the seeds of the apostolate of education based on a distinctive spirituality and an orientation towards civic and cultural involvement. The colleges enabled the Jesuits to pursue several of their aims: they taught Christian doctrine and spirituality to youngsters from the local community as well as offering tuition to their own; and they were seen as a service to the city by teaching and forming community leaders. These schools were originally free, but in time the order found it increasingly difficult to bear the financial burden they entailed. As a result, after the early years Jesuit education did not serve the poorest and most vulnerable in a systematic way until the development of a social apostolate in the modern sense. This changed dramatically from the mid-twentieth century, as awareness of social injustice and suffering grew and education came to be seen as an essential tool of human development.

This chapter follows the parallel development of the Society's social and education apostolates from *Rerum Novarum* to GC32 and beyond. It explores different implementations and interpretations at different times with a particular focus on Latin America. It argues that the Society's ideal of merging the social and educational apostolate offers real hope of delivering social justice to children at the 'frontier'.

2.1 Education and the first Jesuits

‘A true ministry of the order, indeed its primary ministry’

Ignatius and his companions were engaged in theological disputations and lectures before the Society came into being. In this sense it has been argued that ‘the Society was *born*, and did not *become*, a teaching order.’¹ The Order had originally planned to provide accommodation for scholastics who were taught separately at nearby universities. But once it began accepting promising youngsters of good character rather than mature men, these youngsters had to be formed and Ignatius soon began assigning fixed rules for their education. The first thing they needed was spiritual formation, followed by an education in Latin and literature as well as theology. In larger cities colleges destined exclusively for students of the Order were founded from 1540 ‘for their community life and certain other scientific and religious complements of their formation.’² Then rich founders came forward in smaller towns with no universities: the College of Gandia was approved in 1546, and requests for help came from as far afield as Germany and even Goa. But the educational venture started in earnest when Ignatius accepted the request of the municipality of Messina to found a college in that town. When Pope Paul III blessed the staff chosen to run the new college ‘he sent them forth as a new Apostolic College ‘to conquer souls by means of education’.³ By 1550 the new Bull *Exposcit debitum* included *lectiones* in the description of the purpose of the Order.⁴

The Jesuit colleges were thus an extension of the purpose of the order, an essential part of their mission, and were recognized as such in the *Constitutions*.⁵ They combined the defence and propagation of the faith through instruction in Catholic doctrine with an accent on spiritual formation and interiority based on the *Spiritual*

¹ Pedro Leturia SJ, ‘Why the Society of Jesus became a Teaching Order’, *Jesuit Educational Quarterly*, 4/1 (1941), 31-54 (p. 32) (italics in the original).

² Leturia, p. 45. These colleges were endowed with revenues for the formation of students.

³ Leturia, p. 47.

⁴ Leturia, p. 49.

⁵ *Const.* 636: ‘Since the Society endeavors to aid its fellowmen not merely by traveling through diverse regions but also by residing continually in some places, for example, in the houses and colleges, it is important to have learned the ways in which souls can be helped in those places, in order to use that selection of those ways which is possible for the glory of God Our Lord.’

Exercises. Ignatius wanted to provide the best possible education. He opted to follow the methods used at Paris University, where he and his companions had trained, and opted for a humanistic approach to education. This preference, which shaped the Society and its mission, has been amply studied.⁶ Ignatius's choice was made partly on practical grounds – students should be proficient in Latin and acquire a wide culture in order to be able to hold their own in any situation. But classical works of literature were also considered apt to inspire students with lofty values and a sense of service to the common good. Jerónimo Nadal urged teachers 'to find *pietas* in all the authors and subjects studied'⁷ and to draw out the spiritual meaning embedded in the texts. Alongside spiritual development, both intellectual and moral formation were imperative since the students were expected to be men who would 'grow up to be pastors, civic officials, administrators of justice, and ... fill other important posts to everybody's profit and advantage.'⁸ They thus followed what O'Malley calls 'the tradition of character-formation for the good of the city'⁹ which can be traced back to Isocrates.

The first Jesuits were eager to train leaders because they firmly believed in the transformative power of Ignatian leadership. This understanding is behind Pedro de Ribadeneira's assertion: '*Institutio puerorum, reformatio mundi*' ('all the well-being of Christianity and the whole world depends on the proper education of youth').¹⁰ O'Malley later suggested that Ribadeneira's statement should be 'toned

⁶ Other than the article by Leturia quoted above, see John O'Malley, *The First Jesuits* (Cambridge, MA: Harvard University Press, 1993); and 'How the First Jesuits Became Involved in Education' in *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives*, ed. by Vincent J. Duminuco SJ (New York: Fordham University Press, 2000), pp. 56-74; Allan P. Farrell, *The Jesuit Code of Liberal Education: Development and Scope of the Ratio Studiorum* (Milwaukee: Bruce Publishing Company, 1938); George E. Ganss, *Saint Ignatius' Idea of a Jesuit University* (Milwaukee, Marquette University Press, 1954); and John W. Donohue, *Jesuit Education: An Essay on the Foundation of Its Idea* (New York: Fordham University Press, 1963).

⁷ Jerónimo Nadal, quoted in O'Malley, *the First Jesuits*, p. 221.

⁸ Juan Alfonso de Polanco, quoted in O'Malley, 'How The First Jesuits Became Involved', p. 66.

⁹ O'Malley, 'How the First Jesuits Became Involved', p. 66. The school opened in Tivoli in 1550 was intended "*at civitatis utilitatem*". Polanco drew up a list of benefits conferred by the schools, divided into three parts: benefits for the Society, for the students, and for the locality (p. 66; and *The First Jesuits*, pp. 212-3).

¹⁰ O'Malley, *The First Jesuits*, p. 209. Ribadeneira was writing to King Philip II on Ignatius's instructions to ask for permission to establish new colleges in Belgium. The Spanish original read: *todo el bien de la cristiandad y de todo el mundo, depende de la buena educación de la juventud*. O'Malley is reflecting here on the fact that while proper Ignatian education can contribute to

down' a little and translated as "the proper education of youth will mean the *improvement* of the world."¹¹ This sense of a specific mix of spirituality and civic responsibility as the leaven for individual and social transformation, individual and social improvement, was at the root of Ignatian-inspired education from the very beginning. It still endures. A humorous twenty-first century rendering reads: 'Get the kids into a Jesuit school and change the world.'¹² Ribadeneira's words and their various possible translations highlight the importance of the process of transformation, moral, spiritual and social at the heart of Ignatius's vision of education. They explain why the Jesuits were prepared to become 'resident schoolmasters'.

The aim was thus 'persuading and teaching others how to be Christians in the fullest sense, with a special awareness of social responsibility',¹³ and providing the skills to govern the city according to Christian values. Reflecting on the First Formula of the Institute some twenty years after GC 32, O'Malley further argues that since the education of children in Christian doctrine was specified as an essential work of charity, the social justice dimension was at the heart of the Jesuit mission from the very beginning, and there has always been a connection between education and the social apostolate. But is this not reinterpreting the education apostolate through the lens of Decree Four?

The difficulty in answering this question is that notions of service to the poor, social transformation and improvement have changed a great deal since the sixteenth century. So has our understanding of the role of education in relation to society. Ignatius focussed on helping the poor but did not question the causes of poverty or injustice. O'Malley describes the first Jesuits as 'socially conservative', adding that 'it would never have occurred to them that they should make concerted

transforming the world for the better as stated in the Latin phrasing, the claim that 'all the well-being of Christianity and the whole the world' depends on it needs to be contained a little.

¹¹ O'Malley, 'How the First Jesuits Became Involved', p. 66 (italics *not* in the original).

¹² George Bur SJ, 'A word for their parents (from the Mass that opened the parent orientation)', 01.09.2009, <<http://www.thespiritblowswhereitwill.blogspot.com/2009/>> [accessed 10.07.2019].

¹³ O'Malley, 'How the First Jesuits Became Involved', p. 61.

efforts to break down traditional roles and class structures.’¹⁴ In social terms, education was for the use of the city. It could improve society by instilling in learners a strong moral, religious, spiritual framework that also fostered civic responsibility. The Jesuits aimed to provide an education for those who would either need this training to maintain their professional or social status, or who had the necessary aptitude to acquire and use these skills for the service of society. In this sense the translation of ‘improvement’ suggested by O’Malley in 2000 is probably the most adequate. In no way does *reformatio* imply a challenge to existing social structures, let alone a radical change. On the contrary, the aim was to maintain the preserved order but to improve it by ensuring it was governed according to Christian values. The role of education was thus to *reinforce* social structures and institutions as well as religious ones. The important point to retain here is the Jesuits’ keen awareness of the transformative power of education.

For this reason, education in the early days was provided free to anyone with the right ability.¹⁵ In time two factors were going to affect this policy, however. The first was that the Order did not deal with the early years of schooling. Entry into a Jesuit college thus required at least some degree of literacy and numeracy which apart from a few isolated cases, made it *de facto* inaccessible to much of the rural population. The second factor was the need for a steady stream of income to support the colleges. Endowments did not always prove fully adequate in this respect, which explains why in time Jesuit colleges gradually came to serve principally the privileged. The Society’s *Characteristics of Jesuit Education* (1986) acknowledge past ‘excesses’ in this connection, pointing out that ‘today’s understanding of the Ignatian worldview is not to prepare a socio-economic elite,

¹⁴ O’Malley, *The First Jesuits*, p. 211.

¹⁵ This ideal endured for a long time in the Spanish colonies. José Jouanen noted that after the opening of their first college in Quito in 1586 the Jesuits provided free of charge ‘all the types of studies then in existence, thus facilitating access to various charges and public offices for all without exception, whether rich or poor. ‘The Jesuits ... received no payment for their teaching either from the students, whether boarders or day pupils, or from their families. Boarders either received a scholarship or contributed only to the cost of their food. Thus their education was totally free and entailed no expense either for the royal purse or for the city.’ José Jouanen, *Historia de la Compañía de Jesús en la antigua Provincia de Quito, 1570-1777*, 2 vols, *La Vice-provincia de Quito: 1570-1696*, I (Quito: Editorial Ecuatoriana, 1941; digital version: Alicante, Biblioteca Virtual Miguel de Cervantes, 2005), p. 45. The colleges were funded both from donations and the proceeds of Jesuit-owned haciendas in the province.

but rather leaders in service.¹⁶ By the 19th century, for the reasons outlined above Jesuit education was mostly delivered in private colleges for the education of the wealthier sections of society.

This explains why, when the Society in 1892 responded to *Rerum Novarum* on the subject of social work with workers and the poor, the only element of education that seemed appropriate was ‘the spiritual care of men, especially workers and the poor’:¹⁷ a throwback to the First Formula. As the Church developed its social teaching throughout the twentieth century, the connection between education and the social apostolate also evolved, leading to a new reading of what Ignatian education could offer as a tool for transformation. In 1923 GC 27, with reference to ‘social works, as they are called,’¹⁸ recommended that ‘men especially, ecclesiastics in particular, and also workers and the poor, should be formed in the *Exercises*.’¹⁹ In addition to explaining the social teaching of the Church, GC 29 in 1946 advocated ‘guiding the souls of the faithful towards social justice and social charity, and ... establishing social projects.’²⁰ As regards Jesuit colleges, the recommendation was that ‘the principles of social justice be carefully impressed upon the minds of the students in our schools, on both the higher and the middle levels, and the Church’s social doctrine properly explained to scholastics in both philosophy and theology.’²¹

Fr Janssens issued his *Instruction on the Social Apostolate* in 1949, addressing the nature of social justice and the need for both college students and young Jesuits to be taught social responsibility as an essential part of their mission. But in Latin America, St Alberto Hurtado had already for some time fought to put these ideas into practice.

¹⁶ *The Characteristics of Jesuit Education* (1986) in *The Jesuit Ratio Studiorum: 400th Anniversary Perspectives*, ed. by Vincent J. Duminuco SJ (New York: Fordham University Press, 2000), pp. 161-230.

¹⁷ GC 24, D. 20, n. 4.

¹⁸ GC 27, D. 229, n. 1.

¹⁹ GC 27, D. 221.

²⁰ GC 29, D. 29, n. 3.

²¹ GC 29, D. 29, nn. 9-10.

2.2 Integrating the social and education apostolates

2.2.1 Alberto Hurtado and the application of John Dewey's theories

Some of the major changes to affect the Latin American Catholic Church – and Catholic education – in the first half of the twentieth century came from Europe and the United States of America. The aftermath of the First World War saw a Catholic renewal in the region and Maritain's work became increasingly influential at that time. Several Latin American countries – notably Argentina, Brazil and Chile – adopted from the 1930s the Belgian model of Action Catholique, with specialized groups – students, workers, rural youths – targeting their own circumscribed contexts. The young Catholic workers' movements, for example, based their apostolate on their lived experience, challenging young people to apply the 'see, judge, act' approach to their own reality. Analysis of context and needs was carried out in small lay groups, creating a model where dialogue and collective reflection led to transformative action. An awareness of structural injustice as the cause of social problems began to emerge, the harbinger of the notion of 'structural sin'. This, inevitably, led to the question of the appropriate remedy: did it lie in beneficence, or might a more radical reorganization of society be necessary? There were no easy answers, and Action Catholique found itself operating with some very different political bedfellows according to the country and particular political environment.

But whereas French intellectual influences and Belgian organizational models were shaping the Catholic renewal in the Southern Cone, as an educationalist Hurtado, concerned with promoting a more just society, wanted to introduce into Catholic education a more recent set of theories: those of John Dewey.

Dewey had become an influential psychologist and educationalist in the USA and Europe. In connection with education he spoke of social progress,

social reform, social reconstruction. For him, the aim of education was both individual and social, and both aspects were of equal importance. Adamant that school was life itself and not just a preparation for it, he saw the child as a whole to be 'integrated' through reflective thought. This should be based on observation, learning and personal work. The key to educating was discovering the child's interests. Social experience was transmitted by an approach that was half theoretical, half practical, based on direct contact with reality. Dewey thus railed against an over-structured, overly 'bookish' approach to education which only made children the passive recipients of purely intellectual knowledge imparted by their teachers. Against the mere storing up of ideas, he argued for starting from the child's real-life experience and interests. From this premise education was then a social, interactive process involving both action and reflection on action. This approach was supported by a high degree of liberty in the classroom. Dewey placed a great deal of importance on the value of work and on preparing children for work. Equally important was to prepare pupils for democracy through participation. Hurtado, who devoted himself to alleviating misery and creating the conditions for a more just society, became an enthusiastic follower of Dewey's approach to education: 'the social purpose will not be achieved by storing up ideas but by contact with reality, which makes it possible to understand how real life works.'²²

This new approach aroused a great deal of interest in Europe and, to a lesser extent, in Latin America. There attitudes to education were slowly beginning to change under the influence of pedagogical currents from Europe and the United States. Such, in Brazil, was the 'Escola Nova' (Progressive School) movement, influenced by the works of Jean-Jacques Rousseau, Johann Pestalozzi and Friedrich Froebel.²³ But in the Spanish-

²² Alberto Hurtado Cruchaga, 'Le système pédagogique de Dewey devant les exigences de la doctrine catholique', Ph.D. thesis (Louvain, 1935), p. 185. Later published in Spanish as *La pedagogía de John Dewey ante las exigencias de la doctrina católica* (Santiago de Chile: Instituto Profesional de Estudios Superiores 'Blas Cañas', Centro Teológico-Filosófico, 1989).

²³ Pestalozzi believed that all aspects of a child's life contributed to forming that child's character and capacity to reason. Froebel's recognition of the importance of activity and free play in children's learning led to the concept of kindergarten.

speaking world the interest in Dewey's theories remained limited for two reasons, not unconnected. Firstly, the concepts and pedagogy suggested were perceived at best as alien to the local culture, very conservative in terms of educational outlook and methods; at worst, as politically dangerous. Secondly, and worse still from a Catholic viewpoint, Dewey eventually became one of the first exponents of pragmatism: his views on education ignored any possibility of the existence of God or any absolute values in moral terms, and he explicitly rejected the dualism defended by the Church. Thus his philosophical stance was in direct contradiction with Church teachings. Not surprisingly, this made him a controversial figure in Catholic Latin America where the Church had enormous influence on education both private and public.

It is within this context that the young Hurtado began exploring Dewey's theories. Schooled in Ignatian pedagogy, he related to the notion of combining an education grounded in the students' experience as well as academic knowledge, to the discipline of reflection, to teaching the value of work. Moreover, Dewey's interest in the situation of urban industrial workers in the USA also mirrored Hurtado's own experience in Chile. Determined to forge youngsters' social conscience as a Christian response to the grim social needs of his day, he was persuaded by the concept of education as a tool for social transformation. But the only way to embrace Dewey's vision of education in such an environment was to separate it somehow from his philosophical position. Hurtado's first major writing on education was his doctorate, a meticulous examination of Dewey's pedagogical principles – not, he stresses, in terms of their intrinsic value but solely in relation to their compatibility with the Church's doctrine.

The first part of his thesis is an examination of Dewey's philosophical evolution during a long career, beginning with a Hegelian standpoint compatible with Christianity and ending in resolute agnosticism and pragmatism. Chronology in hand, Hurtado could then argue that Dewey developed his pedagogy before and quite independently of his pragmatism

and that consequently, the latter does not invalidate the former.²⁴ The thesis then moves to a meticulous exposition and critique of each aspect of Dewey's educational theories, evaluating its compatibility or otherwise with Catholic doctrine.²⁵ Interestingly, in his thesis Hurtado goes no further. He strictly limits himself to the consideration of congruence with Catholic doctrine and an assessment of whether a Catholic could, in conscience, make use of this or that proposition. He gives away very little, if anything, as to his own theories. But the very fact that his thesis is dedicated to Dewey and focussed on the possible use of Deweyan theories in a Catholic environment, says much about his enthusiasm for potential application.

Clearly, Hurtado could not accept Dewey's philosophical views: his agnosticism as to any absolute value as well as to reality; his understanding of intelligence as nothing more than activity; his refusal to recognize natural law; his absolute rejection of any dualism, 'therefore absolute rejection of the soul and man in the world.'²⁶ By contrast, for Hurtado everything to do with Dewey's actual pedagogy passes muster: the content 'simply' has to be 'completed' and surpassed by incorporating a Christian dimension. For example, the purpose of education as fulfilling both individual and social needs must be completed by adding the God-given rights and duties of both and the possibility of union with God – Ignatian pedagogy is not far below

²⁴ Hurtado quotes the educationalist Edouard Claparède, who contended that Dewey's psychopedagogy, even if an expression of pragmatism, 'is not tied to the fate of that doctrine.' ('Le système pédagogique', p. 178). Claparède's assertion was then used by Spanish and Latin American educationalists as an argument for separating Dewey's unwelcome philosophical ideas from his pedagogy (Rosa Bruno-Jofré and Gonzalo Jover, 'The Readings of John Dewey's Work and the Intersection of Catholicism: The Cases of the Institución Libre de Enseñanza and the Thesis of Father Alberto Hurtado, S.J., on Dewey' in *The global reception of John Dewey's thought: multiple refractions through time and space*, ed. by Rosa Bruno-Jofré and Jürgen Schriewer (London: Routledge, 2012).

²⁵ Hurtado's thesis refers in particular to Dewey's *My Pedagogical Creed* (first published in *The School Journal*, LIV/3, 1897) available at <<https://infed.org/mobi/john-dewey-my-pedagogical-creed>> [accessed 16.06.2020]; *The School and Society* (Chicago: University of Chicago, 1900) and *The Child and the Curriculum* (Chicago: University of Chicago Press, 1902). These works set out Dewey's main pedagogical approach and predate his full support of pragmatism, which was the result of a long philosophical journey. All have been newly edited and published in *The Collected Works of John Dewey*, ed. by Jo Ann Boydston, 37 vols. (Carbondale: Southern Illinois University Press, 1967-91).

²⁶ Hurtado, 'Le système pédagogique', p. 209.

the surface here. The development of the child and the promotion of critical thinking should not be based on purely materialistic criteria: all judgements must relate to a Christian understanding of society. Where Dewey wanted children to discover moral truth through experience and contextualization, Hurtado introduces the concept of the transcendental truth of Revelation, complaining indeed that religious education is a sacred duty ignored by Dewey.²⁷ He did agree with Dewey for decrying the passivity resulting from an overly scholarly curriculum where students are merely fed factual knowledge, advocating instead a more activity- and reflection-based template. In such a model the teacher is only an experienced guide in a learning community. But for Hurtado a teacher's authority comes from the Church, the family, the State. The progressive practice of freedom was important to both educationalists, on the grounds that greater freedom in the classroom and emphasis on internal motivation contribute to character and conscience formation as well as critical thinking.²⁸ Hurtado accepted the enactment of democracy in the classroom as leading to both social and personal transformation. But he could not accept Dewey's own concept of a democracy based on a purely human view of society and social contracts which, in his view, ignored the true aim of life: to praise, reverence and serve God.

Hurtado did, like Dewey, see education as a cure for social evils and an invaluable tool for social transformation. But this was to be achieved by awakening a sense of compassion and a passion for justice: 'all social education starts by valuing justice.'²⁹ Social justice was at the core of his own vision. His writings on the subject show that 'he did not separate education from social morality, or in other words, from the duties towards

²⁷ Hurtado, 'Le système pédagogique', pp. 201-202.

²⁸ Hurtado, 'Le système pédagogique', pp. 165-174.

²⁹ Hurtado, 'Practica de la Justicia' in *Humanismo Social: Ensayo de Pedagogía Social Dedicado a los Educadores y Padres de Familia*, ed. by Samuel Fernández, 2 vols (Santiago de Chile: Ediciones Universidad Alberto Hurtado, 2013), II, pp. 197-212 (p. 197).

fellow humans that are rooted in the Christian message and the teaching of the Church.’³⁰

Indeed, his later writings on education reiterate the same points: as a starting point, discovering the child’s interests; then teaching social solidarity by showing how one’s actions affect others, rather than by dispensing advice or lectures; avoiding a book-centred education based on learning by rote. All these points are Ignatian pedagogical principles, although at no point are the Ignatian roots of his vision explicitly mentioned. Hurtado’s pedagogy increasingly concentrated on developing a sense of *responsabilidad social*, focussing on the parable of the talents (Matt. 25: 14-30) which he saw as representing both individual and social responsibility. He explained in detail how each curriculum subject could enhance an understanding of social justice. Reflection, comprehension, abnegation were the attributes to be developed. Social transformation then would follow through example, word, action, prayer: ‘a praxis whose purpose it is to make social life more human’.³¹

By showing how Dewey’s pedagogy could be ‘completed’ for use in a Christian education promoting social responsibility Hurtado achieved two things. As an educationalist he played a decisive role in making Dewey acceptable to Chile and beyond. As a Jesuit, he had a strong sense of the Society’s commitment to works of mercy – ‘what is now called social works’, as GC 27 put it – and its connection with education as laid down in the Formula. As such he strove to integrate the two long before Decree Four. He always remained realistic as to the feasibility of implementation, however. Without a substantial curricular reform, he argued, ‘it is almost impossible to consider seriously applying an action method in countries such as Chile, which has a horrendously charged curriculum with too many

³⁰ Bruno-Jofré and Schriewer, pp. 30-31.

³¹ Alberto Hurtado Cruchaga, ‘Misión social del universitario’, in *La búsqueda de Dios: Conferencias, artículos y discursos pastorales del Padre Alberto Hurtado, S.J.*, ed. with introduction, selection and notes by Samuel Fernández E. (Santiago de Chile: Ediciones Universidad Católica de Chile, 2005), pp. 97-99.

subjects.’³² And he always complained that too many students left Catholic colleges without a social sense – a sentiment famously echoed by Pedro Arrupe in his 1973 ‘Men for Others’ address to the Jesuit Alumni in Valencia. By and large, an ‘action method’ of education has indeed remained an unfulfilled dream for much of Latin America.

It has been suggested that Hurtado’s reading of Dewey may be a reflection of Maritain’s liberal humanism and the social projects initiated by reformist sectors in the Chilean Church.³³ Be this as it may, his own combination of education and social responsibility jarred with the more conservative views prevalent in the Catholic Church and the Society of Jesus in Chile at the time. Friction ensued. His vision was one of solidarity, of work for the common good, of a more just distribution of riches. Politically, this in itself was potentially controversial. The very concept of *reformatio mundi* in a context where education was meant to maintain the status quo was contentious. This, as we shall see (Chapter 3) was to prove a recurrent theme in the history of the application of Decree 4 in education.

2.2.2 Educating and evangelizing the masses: Latin America

Hurtado’s sense of social responsibility and education for justice was very much in line with the values that led the Catholic and other churches to launch an increasing number of *educación popular* initiatives from the 1940s. Until the middle of last century, a large proportion of Latin Americans lived in destitution. It is estimated that in 1940, approximately half the population of the region was illiterate and this was increasingly being recognized both as an injustice and a major obstacle to development. Traditionally, education had been provided by the Catholic Church and religious orders, mainly for the wealthier sections of society.³⁴ But the

³² Hurtado, ‘La vida escolar como medio de formación social’ in *Humanismo Social*, 399-423 (p. 405).

³³ Bruno-Jofré and Schriewer, pp. 4 and 30-31.

³⁴ State schools, with scarce resources and unreliable teacher training, catered for the poorer sections of society in urban areas, with schooling in rural areas patchy or non-existent.

1950s brought new challenges for the Latin American Catholic Church: the rapid advance of protestant churches; the spread of Marxism among the illiterate masses, especially after the 1959 Cuban revolution; growing secularisation. The Church saw an urgent need both to evangelize and to address social injustice and its causes. Long before Medellín, it had elected education for the poor as its tool of choice to achieve both aims.³⁵

The very first Church-sponsored 'radio school' broadcasting non-formal educational programmes to rural populations was launched by a Colombian priest in 1947.³⁶ It covered literacy and numeracy, catechism and health. After two such small projects had been successfully set up in rural Brazil, the Brazilian Bishop's Conference launched in 1958 the Basic Education Movement (*Movimento de Educação de Base*), a national programme of 'radio schools' supported by Dom Hélder Câmara. Government funding was obtained in 1961, and the Basic Education Movement became the largest basic education programme in Brazil, alongside Recife University's *Servicio de Extensão Cultural*, directed by Paulo Freire.³⁷ In Ecuador, the method was disseminated by Bishop Leonidas Proaño of Riobamba, an admirer of Paulo Freire's and a supporter of liberation theology, who launched in 1963 a radio school in his diocese (*Escuelas Radiofónicas Populares del Ecuador*). This broadcasted in both Spanish and Kichwa to indigenous and rural populations, 90 per cent of whom were then illiterate.³⁸

³⁵ Among the works chronicling the Latin American Church's involvement in *educación popular* are Thomas C. Bruneau, *The Political Transformation of the Brazilian Catholic Church* (Cambridge: Cambridge University Press, 1974); Enrique Dussel, *A History of the Church in Latin America: Colonialism to Liberation (1492-1979)*, trans. and rev. by Alan Neely (Grand Rapids, MI: William B. Eerdmans Publishing, 1981); and Rosa Bruno Jofré, 'Popular Education in Latin America in the 1970s and 1980s: Mapping its Political and Pedagogical Meanings', *International Journal for the Historiography of Education*, 2011/1 (2011), 23-39.

³⁶ Radio Sutatenza, originally set up by Padre José Salcedo Guarín, developed into *Acción Cultural Popular*, which operated in Colombia until 1992. Freire was a member of the Brazilian equivalent, 'Ação Popular'.

³⁷ In 1960, Freire also helped found in Recife the Popular Culture Movement (*Movimento de Cultura Popular*), which offered a programme of activities designed to conscientise the masses through creative art as well as promoting popular cultural and artistic expression. State aid was abruptly withdrawn following a change of government in 1964.

³⁸ The aims and methods of this radio station have remained unchanged, although it no longer has direct links with the Diocese. Regarding such radio stations in Ecuador generally, Alice May Mitchell, *Voices in the Andes: The Churches' Use of Radio in Ecuador* (Edinburgh: Centre for

But the connection between literacy and the right to vote in Brazil meant that educating the masses had serious political implications. And from the outset radio schools explicitly strove for the ‘integral education of the rural populations ... politicizing the consciousness of the rural man, giving him notions of his rights and how to achieve them.’³⁹ Dom Hélder Câmara similarly called for the *conscientização* of the masses: he is credited with popularising the word in the 1960s.⁴⁰ This may explain a certain ambivalence on the part of the Brazilian Conference of Bishops: ‘despite the bishops’ statements in favour of structural change, their actions as individuals often belied their progressive stances ... it is impossible to know how many of the bishops fully appreciated the revolutionary potential in the process of *conscientização*.’⁴¹ There is a deep connection between Hurtado’s call for a more just society and the Church’s use of education for liberation: *educación popular* is also what Medellín, under Freire’s influence, would term ‘*educación liberadora*.’

2.2.3 Paulo Freire: education as the practice of freedom

It is against this background that Freire first outlined his pedagogy in *Education, the Practice of Freedom*, originally published in Chile in 1965.⁴² He insisted that his approach was rooted in the specific context of mid-twentieth century Brazil, a period of transition when people were beginning to awaken to their vocation to be subjects rather than objects, to their ability

Theology and Public Issues, University of Edinburgh, 1993) explores the history, methods and effectiveness of the use of radio for indigenous populations, including issues of education, evangelisation and integration.

³⁹ Procópio Camargo, quoted in Bruneau, p. 80.

⁴⁰ *Critique and Utopia: New developments in the Sociology of Education in the Twenty-First Century*, ed. by Carlos Alberto Torres and Antonio Teodoro (Lanham, MD: Rowman & Littlefield Publishers, Inc., 2007), p. 158. *Conscientização*, the original Portuguese-language coinage, is used here in the context of Brazil, and the Spanish translation *concientización* in relation to other Latin American countries.

⁴¹ Bruneau, p. 81. Indeed, when the Basic Education Movement found itself in difficulty under the new military regime in the 1960’s, the Church authorities did not explicitly defend it.

⁴² Paulo Freire, *Education, the Practice of Freedom* (London: Writers and Readers Publishing Cooperative, 1976).

of going beyond a purely natural state and creating culture through their work, to their need for critical, political awareness so they could transform their world. His system was tailored to a particular historical time and place, and a particular phonemic language: Portuguese. The ultimate aim was to raise the learners' awareness of the reality of their situation and give them the necessary tools for action and reflection as means of social transformation.

In the wake of Vatican II, as liberation theology was just beginning to emerge, Paulo Freire's *Pedagogy of the Oppressed* was one of three major statements expounding the notion of education as an essential part of the quest for social justice. The other two were CELAM's 1968 Medellin document on *educación liberadora* (2.5 below) and Pedro Arrupe's speech to the Jesuit Alumni in Valencia in 1973 (2.8).

Freire had been developing and systematising the combination of pedagogical theories and political trends that had slowly been emerging since the 1930s.⁴³ Although he emphasized class over race, the stark binary opposition between oppressors and oppressed did not become a central feature of his work before the *Pedagogy of the Oppressed* in 1971.⁴⁴ Starting from the premise that illiterate learners possess a store of knowledge about their own reality but no skills to analyse it, *Pedagogy of the Oppressed* presents education as a dialogue, an exchange of knowledge between teacher and learner, rather than the traditional 'bank depositing' of facts into students' minds. Through phonetic cards and pictorial representations of their own reality the learners, gathered in small groups or 'culture circles', are taught not only to read, but also to use 'generative'

⁴³ The *Instituto Superior de Estudos Brasileiros* (Higher Institute of Brazilian Studies), an institution for the research and teaching of social science research founded in 1955, formulated an ideology of "developmental nationalism". This was based on the belief that economic development together with the fostering of a sense of nationhood would generate a new Brazil of social harmony. This belief in turn gave rise to the idea that the masses should be educated in order to improve their lives and transform society. The key to achieving the transition to this utopian Brazil was *conscientização*. Freire worked closely with the Institute and was greatly influenced by its approach.

⁴⁴ Paulo Freire, *Pedagogy of the Oppressed*, trans. by Myra Bergman Ramos with an introduction by Donaldo Macedo, 30th anniversary edition (New York: Continuum, 2000).

words typifying their daily life. Thus the dialogue around their lived experience and the reasons behind it can develop, leading to further reflection and a deeper understanding of the social and political environment. This process of awakening generates a critical awareness of the learners' conditions of oppression. From this will come action – praxis – which will transform the oppressed into subjects of their own history and agents of change. As action is then evaluated, the constant dialectic between reflection and action leads to further cycles of transformation. For Freire, education is 'an act of knowing and a means of action for transforming the reality which is to be known'⁴⁵. Dialogical education, unlike its 'bank depositing' counterpart, is humanizing and liberating precisely because through dialogue, it leads to transformative action.

The influence of Dewey on Freire's thought is evident in a number of ways: his insistence on an education steeped in reality, his dislike of what he called 'banking education' (the storing up of memorized academic data drilled in from above), his preference for context-related teaching and a horizontal teacher-learner relationship where all learn from one another. In this sense Freire's pedagogy also echoes Hurtado's although initially at least, Freire's learners were mostly adults in non-formal settings rather than adolescents in classrooms. But whereas Hurtado's main concern was to remodel Dewey's principles according to Catholic doctrine, Freire's outlook was unashamedly framed by a political stance steeped in Marxism, a philosophy which he did not consider to be in contradiction with the Gospel message. Thus his starting point in *Pedagogy of the Oppressed* is the recognition of a current state of dehumanization in terms clearly reminiscent of *PP*: 'incomplete beings conscious of their incompleteness'⁴⁶ suffering 'dehumanization',⁴⁷ the result of an unjust order which must be challenged. The process then unfolds against a background of class struggle. Since the

⁴⁵ Paulo Freire, 'Education: Domestication or Liberation', *Prospects*, 2 (1972), 173–81 (pp. 180–181).

⁴⁶ Freire, *Pedagogy of the Oppressed*, p. 41.

⁴⁷ Freire, *Pedagogy of the Oppressed*, p. 42.

oppressed have internalized their condition and are in fear of possible freedom, it is essential as a first step to identify the causes of oppression. This principle is no different from Dewey's and Hurtado's insistence on context and experience-based reflection. But Freire goes further because he is explaining the process from the point of view of the oppressed who need to confront the established order and indeed, bring it to an end. Thus reflection becomes '*conscientização*', the raising of social and political awareness of the causes of unjust structures to be challenged. In *Pedagogy of the Oppressed* the intended outcome is 'revolution'. This, Freire explains, occurs in two stages: first a private revolution – eliminating the internalized shadow of the oppressor; then a social revolution – the radical transformation of unjust structures. The outcome of this new awareness – first facilitated then supported by literacy – is that the oppressed become subjects rather than mere objects of history and agents of personal as well as social change. Literacy and *conscientização* are the two facets of this one process. Whilst the precise form of the new society envisaged is not clearly spelt out, the repeated use of the term 'revolution' and the call for a radical change of structures clearly go a great deal further than the utopia of the just society envisioned by Hurtado.

2.2.4 Medellín and *educación liberadora*

CELAM held its second conference in Medellín in 1968, a year after the publication of *PP*. Integral human development and social justice dominated the agenda. The Bishops used the traditional see-judge-act method to formulate their own contextualization of *PP*. Their conclusions include a specific section on education, published just three years after *Gravissimum educationis*.⁴⁸ There is little similarity between the two documents other than comments regarding the duties of parents as first educators of their children and the general characteristics of Catholic schools. Instead, the

⁴⁸ There is next to no reference to Vatican publications in Latin American works on education, Church teaching in this connection being transmitted through CELAM's pronouncements and the pedagogy of the particular religious order involved.

Bishops start with a blunt assessment of education and its potential in the Latin American social context. And their judgement – like that of Hurtado and indeed like that of Freire, whose work was already known and who acted as a consultant at the conference – is absolutely clear. Like Freire, their prime concern is for rural populations. Illiteracy militates against human development, they say, especially among indigenous populations. It condemns its victims to servitude, prejudices, superstitions, inhibitions, fanaticism, fatalism, and fear of a world they poorly understood. Liberating uneducated masses from these inhuman conditions is thus the duty of every Christian.

Medellin's solution was *educación liberadora*, an education that would prioritize critical thinking over mere transmission of academic knowledge. It must also educate for social justice: a realistic awareness of social structures and issues would awaken the learner's social conscience. This, for Medellin, is the key to promoting integral human development as outlined in *PP*. It will convert learners into the subjects of their own development and agents of change.⁴⁹ In this way liberation from inhuman conditions and integral development can be achieved by all.

The influence of Freire's thinking here is clear. Nonetheless, it seems that Medellin, forthright in social terms as its conclusions may appear, did here with Freire's work precisely what Hurtado had done with Dewey's. It toned down the troublesome ideology underlying the terminology and harmonized the method with the Gospel message and the Church's more recent pronouncements on social justice. Medellin could see the benefits of using Freire's method of awakening social conscience in order to reach a realistic assessment of structural injustice. But it changed the politically dangerous message of revolution to a message of justice and peace. The formation of a social conscience to bring about a more just society is a huge part of CELAM's vision of education – very much as it was for Hurtado. Thus

⁴⁹ *Med.* 4.8, pp. 99-100.

regardless of its use of Freire's approach and terminology of conscientisation, Medellín's concept of liberation and education remains uncompromisingly rooted in a Christian worldview in which social responsibility is an inescapable Christian duty. In this it arguably it owes a great deal more to Hurtado than it does to Freire.

2.2.5 From the base ecclesial communities to a new way of being school

One consequence of Medellín was the formation of base ecclesial communities (BECs), often in isolated areas, to promote simultaneously both evangelization and *educación liberadora*. BECs were culture circles par excellence. In these small, homogeneous community members could, and did, learn not just for the sake of evangelization but also for mutual support, solidarity, critical awareness and preparation for transformative action. The educationalists Danilo Streck and Aldino Segala point to two aspects of the Latin American Church's involvement in *educación popular* through the BECs that had particular impact.⁵⁰ *La mística* was the articulation between spirituality and social commitment. It brought about profound liturgical renewal and promoted social and political cohesion, giving the church a role initially in resisting dictatorships, and later in re-democratization.⁵¹ The second aspect concerned the see-judge-act method,

⁵⁰ Danilo R. Streck and Aldino L. Segala, 'A Theological-Pedagogical Turning Point in Latin America: A New Way of Being School in Brazil', in *International Handbook of Catholic Education: Challenges for School Systems in the Twenty-First Century*, ed. by Gerald Grace and Joseph O'Keefe (Dordrecht: Springer, 2007), pp. 165-180 (p. 171).

⁵¹ The use of the concept of *mística*, rooted in religious ethics and liberation theology, has been traced to Brazilian social movements. According to the sociologist Daniela Issa, it refers to 'the representation through words, art, symbolism, and music of the struggles and reality of a social movement. [...] *Mística* is also used to refer to the more abstract, emotional element, strengthened in collectivity, which can be described as the feeling of empowerment, love, and solidarity that serves as a mobilizing force by inspiring self-sacrifice, humility, and courage [...]. Its origins are found in the spiritual mysticism of liberation theology, which sees the poor as the object of love.' (Daniela Issa, 'Brazil: Praxis of Empowerment: *Mística* and Mobilization in Brazil's Landless Rural Workers' Movement (MST)' in *Rethinking Latin American Social Movements: Radical Action from Below*, ed. by Richard Stahler-Sholk, Harry E. Vanden and Marc Becker (Lanham, MD: Rowman & Littlefield, 2014), pp. 85-100 (p. 87). For Leonardo Boff, 'Christian *mística*, because it is historic, is oriented towards following Jesus. This implies a commitment of solidarity with the poor, since Jesus was one of them and personally opted for the marginalized. [...] It implies a commitment of personal and social transformation, present in the utopia preached by Jesus of the Kingdom of God that is realized in justice for the poor and, from that, [justice] for all and for all creation.' Leonardo Boff (1993), quoted in Issa, p. 89. *Mística* implies dedication to a cause. It uses collective memory

rooted in a reading of reality first subjected to reflection, then leading to action and transformation – the method long promoted in connection with Action Catholique. Alongside bible-reading movements still active today, the educational work of the BECs also included participation, democracy and leadership training. Thus *educación popular* retained its ideals of social transformation – radical transformation even – but theoretically at least, remained firmly contained within the Christian framework. It was part of a ‘new way of being Church’. Marcello Azevedo describes this new form of concern for the whole person as ‘integral evangelization’: ‘*Activation of the laity and integral evangelization were two transforming components [...] something new in the paradigm of the Church’s activity.*’⁵² It was also education for a more just society. But the risk of politicisation linked to the method and the call to transformative action were very real. It is precisely the political undertones of *educación popular* and the influence of Freire and liberation theologians that later made the BECs suspect to both right-wing regimes and the more conservative hierarchical church.

Yet the popularity of this new type of education for non-formal settings such as BECs led to a new approach to the pedagogy used in schools and universities.⁵³ As regards Catholic education, Medellin and Puebla thus marked what Streck and Segala call a ‘theological-pedagogical turning point’: by adopting a liberating educational approach, the Church claimed a new presence in the field of education. ‘*A new way of being the church becomes a new way of being the school. [...]* Countless experiences

to promote a sense of collective identity based on shared history as well as class and cultural values, which encourages members of a movement to become agents of change (pp. 85 and 99). It was also an essential part of Vélaz’s understanding of his work (see 3.1-3.2) and it remains part of FyA self-understanding today. In a recent audience with leaders of FIFYA Pope Francis praised FyA’s ‘*mística of inclusion*’ as a great strength of the movement. (17.06.2019, video message to FIFYA at <https://m.youtube.com/watch?v=UAgL_2BD6BA> [accessed 31.07.19].

⁵² Marcello de Carvalho Azevedo SJ, *Basic Ecclesial Communities in Brazil: The Challenge of a New Way of Being Church*, trans. by John Drury (Washington, D.C.: Georgetown University Press, 1987), p. 27 (italics in the original).

⁵³ Many Latin American countries formally adopted constructivist approaches in mainstream education in the 1980’s and 1990’s, with Freire’s theories still influential. For Ecuador see Ministerio de Educación del Ecuador, *Pedagogía y Didáctica: Programa de formación continua del magisterio fiscal* (2013) at <<http://educación.gov.ec/wp-content/uploads/downloads/2013/03/SiProfe-Pedagogia-y-didactica.pdf>> [accessed 29.03.14].

emerged that serve as an inspiration for the church's social commitment through education even in the present.⁵⁴ One of these experiences was Fe y Alegría.

2.2.6 Masses and minority 'elites': Gospel message and pedagogy

Even 'in the light of our mission today'⁵⁵, the best model to counteract dehumanization and determine the exact nature and extent of social transformation is a matter on which differences of opinion were bound to arise 'even among sincere Catholics.'⁵⁶ The involvement of clergy and religious in education for social development was one thing. Their further involvement in social matters with political implications was quite another. Implementing *educación popular* and *educación liberadora* entailed that dilemma. What kind of social transformation could Christian education legitimately promote? Would a radical solution, involving maybe the use of violence, be a permissible option? Clear answers were not formulated until later in the 1970s when the Magisterium reminded those involved of the reciprocal roles of priests and laity, the differentiation between spiritual ministry and social justice battles, the fundamentally Christian nature of a more just society and the acceptable means to achieve it. Even then, both theory and praxis continued to generate tensions and conflicts within religious orders and institutions, as we shall see in Chapter 3 in connection with the founding of Fe y Alegría.

A further theological question with deep implications for pedagogy had also arisen concerning the very nature of a liberation theology: the opposition between masses and minorities in the transmission of the Gospel message and, consequently, in Christian education. Juan Luis Segundo was a lucid exponent of this conundrum. Starting from the premise that the moral

⁵⁴ Streck and Segala, p. 175 (italics in the original).

⁵⁵ GC 33, D. 2, n.44.

⁵⁶ John XXIII, Encyclical *Mater et Magistra*: On Christianity and Social Progress (Vatican: LEV, 1961), 238.

message deriving from divine revelation, despite any claim to the contrary, varies in time and according to the ‘maturity of man’, Segundo considers the mechanisms used by the Church to incorporate this message into ‘mass awareness’ and turn it into mass lines of conduct. This leads him to a fundamental question regarding the formulation of any liberation theology: ‘Was the original Christian message aimed at masses as such, so that it must be thought out and propagated in those terms; or was it rather aimed at minorities who were destined to play an essential role in the transformation and liberation of the masses?’⁵⁷

When reflecting on this question within the Latin American context, we need to remember that the first seeds of liberation theology emerged not from a popular movement but from universities.⁵⁸ Indeed, Gutiérrez raised precisely the same issue as Segundo in a 1970 publication, suggesting that a specially trained minority – he does not use the word *elite* – may well be necessary for the transmission of the Gospel message of liberation.⁵⁹ This could have been an allusion to the setting up of base ecclesial communities, although Gutiérrez never raised the matter again in these particular terms.

Segundo, for his part, explicitly considers the use of ‘minority elites’ as inevitable for a number of reasons. He first rests his case in connection with the ecclesiastical formulation of the problem, expanding on the ambivalence of the Church which, in his view, lays down heroic and even superhuman demands on the one hand, but on the other hand uses every means to ensure the participation of the masses ‘at some minimal level of adherence to the

⁵⁷ Juan Luis Segundo, *The Liberation of Theology*, translated by John Drury (Maryknoll, New York: Orbis Books, 1976), p. 209.

⁵⁸ ‘The context for this new trend in Latin American theology was the university, or, in other words, middle-class people. [...] Thus it was not the oppressed people but the middle classes, beginning with students, who received the first features of this liberation theology as a joyful conversion and a new commitment.’ Juan Luis Segundo, ‘Two Theologies of Liberation (Toronto, March 22, 1983)’ in *Liberation Theology: A Documentary History*, ed. with introduction, commentary and translations by Alfred T. Hennelly SJ (Maryknoll, NY: Orbis Books, 1990), pp. 353-366 (p. 357). Segundo in this article gives a full account of the genesis of liberationist ideals in Latin American universities starting before the Second Vatican Council.

⁵⁹ Gustavo Gutiérrez, *Líneas pastorales de la Iglesia en América Latina: análisis teológico* (Santiago de Chile: Instituto Catequístico Universidad Católica, 1970).

gospel message.’⁶⁰ Opposing the need to increase membership for salvation purposes, he argues that for the sake of numerical universality, the Church has turned the Christian message into a mass reality and made it easier, thereby devaluing it. ‘If we define “inhuman” as anything and everything that diminishes the person and turns him or her into a domesticated one-dimensional being, then the worst contradiction in the praxis of the Church is the fact that it has tried to achieve liberating ends like those of grace and salvation by mass means that are intrinsically opposed to liberation.’⁶¹

Segundo then uses socio-political arguments to defend his position. He points out that Lenin, in *What is to be Done?*, admitted his mistrust of the consciousness and spontaneity of the masses, owing to what he saw as their tendency to oversimplification – ‘which makes an extra rouble more important than politics’ – and ‘immediatism’ which favours the individual in the present moment over future generations.⁶² Turning next to science, Segundo sees in the law of inertia, operative in human beings as well as inert matter, the proof that the majority of people will naturally follow the lines of least resistance and save their energy for purely personal issues. In this sense, he says, ‘all of us human beings are, by definition, [both] masses and minority.’ Crucially, Segundo also finds in the Bible the justification for his position, quoting Joseph Ratzinger on the issue: ‘It is quite clear from Scripture that God divides humanity into two groups, one being “the little flock” and the other being the vast “multitude”. The point is made repeatedly in the Scriptures.’⁶³ In conclusion, writes Ratzinger, ‘we could say that [God] uses the numerical few as a leverage point for raising up the many.’⁶⁴

⁶⁰ Segundo, *The Liberation of Theology*, p. 212.

⁶¹ Segundo, *The Liberation of Theology*, p. 215.

⁶² Vladimir I. Lenin, quoted in Segundo, *The Liberation of Theology*, pp. 218-219.

⁶³ Joseph Ratzinger, quoted in Segundo, *The Liberation of Theology*, p. 228.

⁶⁴ Joseph Ratzinger, quoted in Segundo, *The Liberation of Theology*, p. 228. Ratzinger concludes that ‘both have their role in salvation, which is different, but there is only one way to achieve salvation.’ Joseph Ratzinger, *Das neue Volk Gottes* (Düsseldorf: Patmos-Verlag, 1969), p. 334; passage appearing in translation in ‘The New Pagans and the Church: A 1958 Lecture by Joseph

Segundo's comments go back to a time when various 'new ways of being Church' were being proposed. The 'leaven in the mass' could describe the priestly role.⁶⁵ But this does not seem to be what either Gutiérrez or Segundo had in mind in the texts mentioned above. One possibility was that the BECs should choose and train politically – and theologically – socially aware leaders, making them 'a leaven in the mass'.⁶⁶ P. Julio Gortaire, a Jesuit missionary in rural Ecuador for over forty years, suggests a similar solution. He argues that in the particular context of the Andes, where the concept of community is crucial spiritually as well as socially, the answer may be to focus on the elected community leaders and train them to lead their communities to Christ – a strategy he has used successfully as a missionary. Commitment to Christ then becomes a communal enterprise, a way of living faith as part of a close-knit group rather than as an individual.⁶⁷ This solution is not very different from the mode of action of the BECs, which still exist in the Ecuadorian Andes in more remote areas where community bonds are strong but the regular presence of a priest cannot be expected. But ultimately this pattern itself is another version of the few leading the many.

An unexpected confirmation of Segundo's accusation of ambivalence on the Church's part, certainly in Latin America, can be found in the Medellín documents. In relation to conscientisation for justice and a liberating education, the 'Justice' document stresses the special role of 'key-men' (defined here as legislators and decision-makers) in effecting the necessary

Ratzinger', trans. by Kenneth Baker SJ, <<https://www.hprweb.com/2017/01/the-new-pagans-and-the-church/>> [accessed 20.07.2019).

⁶⁵ The issue, already treated in GC32 D10, is also raised *inter alia* first by Paul VI's warning to the Society of Jesus in connection with Decree 4 that it should 'not let the priesthood become devalued in the Society.' (Calvez, *Foi et Justice*, pp. 48-9 and 52. John Paul II insisted in 1980 in Rio on the necessity of distinguishing between the tasks proper to priests and those proper to the laity; and reminded the Jesuit Provincials in 1982 of the 'essentially spiritual nature' of the priestly ministry (Calvez, pp. 65-66).

⁶⁶ John Paul II, Encyclical *Redemptoris Missio*: On the permanent validity of the Church's missionary mandate (Vatican: LEV,1990), 51.

⁶⁷ P. Julio Gortaire Iturralde, private conversation quoted with permission.

changes.⁶⁸ Further on, recommendations for the pastoral cares of the Masses and the Elites are presented in two separate sections. The elites here are defined as ‘high level leaders’ in any field.’⁶⁹ The proposal is that a committed minority within the elites – a minority within a minority – should team up and work with the ‘right’ pedagogy to form the masses. Members of this small minority should be made aware that ‘they are apostles.’⁷⁰ The document stipulates that clergy formation should encourage particular attention to this specialized type of pastoral work.

This is a striking illustration of Segundo’s point about the dissonance between minorities and masses. The Medellin Documents display a stark contrast between the description of the conditions suffered by the dehumanized masses ‘full of fears and superstitions’,⁷¹ and the situation of the few who can promote their development. This contrast hints at unquestioned social prejudices that make a twenty-first century reader rather uncomfortable. Similar attitudes could of course be found among individual bishops. This also raises issues in terms of the praxis of promoting justice. No matter how sensible it may be in terms of implementation, the approach suggested here rests on an unashamedly top-down approach driven by duty rather than genuine solidarity between agents (see Section 1.5 above).

This discussion seems to have taken us a long way away from education. But whilst Segundo is indeed more concerned about theology, his argument does spill over into education in two ways. It leads him firstly to a severe critique of Freire’s method of *concientización* – and, by implication, also potentially of Medellin’s *educación liberadora*. Freire’s approach to education was, as we have seen, twofold. Aimed at the masses, it consisted

⁶⁸ *Med.* 1.19, p. 66.

⁶⁹ *Med.* 7.1, p. 129. There follows a list of all the particular groups concerned, from artists to scientists, from professionals to politicians, including their socio-political and religious commitment characteristics.

⁷⁰ *Med.* 7.4, p. 133. Segundo similarly did not see the notion of minorities as equating to elitism as long as the minorities placed their skills at the service of all.

⁷¹ *Med.* 6.2-4, pp. 121-23, referring to popular religiosity.

in achieving more or less simultaneously literacy and the conscientisation of the masses. It liberated the latter by making them understand the causes of their plight and encouraging their sense of agency. In this model literacy and *concientización* go hand in hand.

For Segundo, they simply cannot. Literacy, he concedes, is a straightforward case. It is a skill anyone can acquire and acquire once and for all. It leads to the ability to read and write, an invaluable tool that opens doors to all sorts of possibilities, from personal enjoyment to better employment and civic participation. *Concientización*, however, is a totally different matter. For Segundo, the very statement that learners turn from ‘passive objects’ into ‘active subjects’ defines the process as a never-ending one. A learner who stops striving to be an active subject will immediately fall back to the state of passive object. Nor does *concientización*, unlike literacy, become easier with time. On the contrary, the more awareness is achieved, the more difficult it becomes to deal with the complexities of reality. Life actually becomes more complicated after *concientización*. Therefore, concludes Segundo, in accordance with the principle of inertia,

[u]nless there is some change in the numerical proportions between the easy and the difficult on the human level as such, literacy training can be a mass process but *concientización* cannot. To push people towards situations that are more complex, difficult, and intermediate is to create minorities.⁷²

As a matter of fact, Freire himself was well aware of the problem. He notes that training course participants will not infrequently ‘call attention to “the danger of *conscientização*” in a way that reveals their own fear of freedom.’⁷³ The oppressed, he says, are dual beings: they want freedom, but they fear it; they want change, but they are afraid of it. And he quotes Georg Lukács’s view that revolutionary leaders must ‘explain to the masses their own action’⁷⁴ in order to ensure both present continuity and the future

⁷² Segundo, *The Liberation of Theology*, p. 219.

⁷³ Paulo Freire, *Pedagogy of the Oppressed*, p. 35.

⁷⁴ Georg Lukács, quoted in Freire, *Pedagogy of the Oppressed*, p. 52.

development of the revolution. In this sense, for Freire, the need for conscientisation to shape mass mentality is a problem which any revolution leader must face. Thus this 'process of permanent liberation is only a stage of the revolution and enacted through praxis.'⁷⁵ For Segundo, this process cannot end. For Freire, the product of conscientisation takes root through praxis and fosters agency on the part of the oppressed: thus ultimately, liberation can be achieved once and for all. It is precisely on this basis that Freire retains the conviction that *everyone* can ultimately be freed from the oppression and exercise agency for social transformation.

This can be an answer to Segundo's critique of *concientización* under two conditions. Firstly, mass *concientización* needs to be only a stage of the revolution, or at the very least to precede a period of radical structural transformation. In other words, it needs to apply only in 'limit situations' and for a limited time span. Secondly, it is designed more specifically for informal adult education. Freire's pedagogy spread in Latin America at a time of deep change in society and in the Church, when it seemed that every aspect could and should be renegotiated. In such times of social and religious upheaval, *concientización* can be a useful tool, and one that *educación popular* by its very nature needed to use. At that stage the young FyA movement did use Freire's vision of liberation *by* – rather than *for* – the oppressed and his dream of social transformation, in spite of the founder's resistance due to the political connotations (see Section 3.3 below). In his emphasis on personal freedom and change from below Freire now seems conceptually nearer to the CA than to Hurtado. Once freedom has been achieved, individual and community flourishing for all theoretically seem to be the natural next stage. But is this case?

⁷⁵ Freire, *Pedagogy of the Oppressed*, p. 52.

2.2.7 Social justice and the education apostolate

This opposition between the few and what Medellín and Segundo call the elites has in fact been a recurring concern in the Society's efforts to integrate education and the social apostolate. Janssens' 'Instruction on the Social Apostolate' was a reminder of the need to include training for social justice into the education apostolate, in terms and with means reminiscent of those advocated by Hurtado. Janssens was unusual in highlighting the danger of focussing on the symptoms of injustice rather than on their root causes. For him the key to procuring enough temporal and spiritual goods to preserve human dignity was love. Consequently it required men inflamed with love of God and neighbour. Young Jesuits should be trained accordingly. In Jesuit colleges teachers should inculcate their students with the charity of Christ as applied from magisterial teaching, as well as 'reverence and gratitude towards the working man'.⁷⁶ Visits to the poor, to factories, mines and social centres were to be encouraged in order to 'fill the heart of students with love for the masses.'⁷⁷

Documents of the Society of Jesus gradually began reflecting new developments in education from vocational training to *educación popular* in acknowledgement of their importance for social justice. In 1957 GC 30, focussing more particularly on urban initiatives, 'strongly [recommended] trade schools and night schools for the education of young working-class people wherever this work will be judged to be truly useful.'⁷⁸ *GE* in 1965 simply noted that Catholic schools may 'take on different forms in keeping with local circumstances'.⁷⁹ But in that same year GC 31 devoted a whole Decree to the apostolate of education. Re-stating the Society's traditional approach in this respect, it nonetheless advocated receptiveness towards new

⁷⁶ John Baptist Janssens, nn. 19-20.

⁷⁷ Janssens, n. 20.

⁷⁸ GC 30, D. 52, n.2.

⁷⁹ Pope Paul VI, *Gravissimum educationis*: Declaration on Christian Education (Vatican: LEV, 1965), 9.

forms of education ‘either in our own schools or elsewhere’⁸⁰, allowing the possibility of ‘various ways and types of institutions’ as well as new pedagogical methods liable to ‘reach those who would otherwise be deprived of schooling.’⁸¹

Before even GC 32, the most powerful call for the integration of the social and education apostolates had come from Pedro Arrupe. Just like Hurtado, Arrupe feared that Jesuit education was failing to educate for justice ‘if the terms “justice” and “education for justice” carry all the depth of meaning which the church gives them today.’⁸² Like Janssens he sought the solution in love of God and neighbour, continuing:

The prime educational objective must be to form men-for-others; men who will live not for themselves but for God and his Christ [...]; men who cannot even conceive of love of God which does not include love for the least of their neighbours; men completely convinced that love of God which does not issue in justice for others is a farce.⁸³

Education for justice thus was a ‘call to conversion’⁸⁴ leading to ‘a firm resolve to be agents of change in society.’⁸⁵

As education initiatives for the poor and the marginalized took off in all continents, the Society found itself in effect promoting two distinct types of education operating in parallel. GC 31 had tried to include both, giving at least some measure of encouragement to the one without in any way compromising the other. GC 33 went further. Reviewing in 1983 how the ‘the integration of the service of faith and the promotion of justice in one single mission’ had been implemented since GC 32, it chose as its first example the educational and intellectual apostolate. For the first time a

⁸⁰ GC 31, D. 28, n. 4.

⁸¹ GC 31, D. 48, n. 5.

⁸² Arrupe, ‘Men for Others’, 2.

⁸³ Arrupe, ‘Men for Others’, 1.

⁸⁴ Arrupe, ‘Men for Others’, 13.

⁸⁵ Arrupe, ‘Men for Others’, 19.

General Congregation explicitly recognized *educación popular* and its intended transformative impact as a work of social justice within the Jesuit mission:

Jesuits who work in schools of whatever kind or level or who are engaged in non-formal or popular education can exercise a deep and lasting influence on individuals and on society. When carried out in the light of our mission today, their efforts contribute vitally to “the total and integral liberation of the human person leading to participation in the life of God himself.”⁸⁶

Twelve years later the understanding of transformation had shifted again. What GC 34 expected from centres of non-formal education was literacy, training in technical and social skills, and ‘a religious and ethical formation geared to the analysis and transformation of the [students’] society.’⁸⁷ No mention here of ‘liberation’ with socio-economic or political connotations. Nonetheless, the first purpose of education as envisaged by Ignatius is preserved in its totality in this programme. The role of these centres – and presumably also the role of *educación popular* centres dispensing formal education – is to form reflective, well-informed, religiously literate men and women of any background capable to take on leadership for change in their communities and achieve the *reformatio mundi*.

But for the Society of Jesus, this still leaves a number of challenges. How can it successfully promote two distinct streams of education with a different social purpose? And what are the challenges facing contemporary *educación popular*?

There is in theory no reason why promoting different types of education should not be possible. Flexibility, as O’Malley reminded us (Section 1.2) is one of the charisms of the Society. But let us return to Janssen’s Instruction for the Social Apostolate and his recommendations for forming a sense of

⁸⁶ GC 33, D. 2, n. 44, quoting GC 32, D. 2, n. 11.

⁸⁷ GC 34, D. 18, n. 4.

social responsibility. When he described the role of ‘our schools’ in social justice, asking for students to see at first hand the workers’ reality so that they might be filled with ‘compassion for the multitude’ and ‘love for the masses’,⁸⁸ the vast majority of these students were from a privileged background. When Hurtado spoke of the need for youngsters to acquire a sense of social responsibility, his target audience was the staff and parents of private Jesuit colleges and universities. When Arrupe gave his speech to the Jesuit Alumni, recommending the formation of ‘men for others’, he was speaking largely to the upper classes. All strove to inspire the charity which underpins Decree Four: a love of God and neighbour which animates faith and is expressed in works of justice. They were also, like the first Jesuits, trying to develop a sense of Christian leadership among those ‘of whom we can expect ... a greater influence on society.’⁸⁹ The place occupied by private Jesuit education in the 19th and 20th centuries means that to a large extent, these appeals to social justice inevitably entailed a top-down approach to both justice and education. This explains a severe judgment on Jesuit education by José María Vélaz, a staunchly conservative Jesuit but a committed believer in education for all as a *sine qua non* condition of social justice: ‘The old elitist concept still subsists in Jesuit education: it is the most dangerous sociological mistake we can make today.’⁹⁰

In the particular Latin American context, Vélaz also throws light here on the historical socio-economic structure of that continent: a society where differences in income and social status are stark. Thus inevitably the notion of ‘elite’, even used in a theological context, acquires social connotations. Segundo sometimes talks of ‘minorities’ rather than elites. Ratzinger, in the passages quoted by Segundo above (Section 2.7), opposes *die Vielen* and *die Wenigen* – the many and the few. The few are simply the leaven in the mass. Does this make it more acceptable to the many? The integration of different

⁸⁸ Janssens, nn. 19-20.

⁸⁹ GC 31, D. 28, n.10.

⁹⁰ Vélaz, quoted in Joseba Lazcano Uranga, *José María Vélaz, Jesuita* (Bogotá: Federación Internacional de Fe y Alegría, 2018), p. 70.

apostolates requires careful use of vocabulary if it is to remould past mindsets. Things undeniably have changed since the 1970s. The Jesuit Mexican Province famously closed its colleges for the privileged as a response to GC 32's call for justice. The education of the poorest is now officially regarded as an essential part of the Jesuit mission, seemingly a proof of the conversion Bisson believes has taken place within the Order (see Section 1.8 above). It can now be said that 'today the majority of the beneficiaries of the Society's education, be it offered in collaboration with other religious congregations or the laity, are for the most marginalized groups.'⁹¹ But the study of Fe y Alegría Ecuador will show that in practice, things may not have changed as much as one would expect and this process of 'conversion' is not yet complete. In that country at least, the association between Jesuit education and elites endures in public perception. And when resources are scarce the dilemma of a choice between educating the many and educating the few can be acute. Beyond the obvious social implications, this choice also depends on the answer to the broader question of who are perceived as the most effective potential leaders, both to serve the city and to transmit the Gospel message.

Can the two streams then exist comfortably side by side, as the different facets of one Ignatian family? The *Characteristics of Ignatian Education* and its practical counterpart, *Ignatian Pedagogy*⁹² provide a broad framework for the development of the whole child which aims to be applicable in all contexts. But education for critical thinking and leadership has traditionally been provided in larger, private institutions. In state-funded schools, in regions where children are still provided with a 'banking' education rather than encouraged to think for themselves, its

⁹¹ José Alberto Mesa, SJ, 'La educación inclusiva: una mirada desde la tradición de la Compañía de Jesús', (Bogotá: Federación Internacional de Fe y Alegría, 2013). Mesa points to Fe y Alegría in Latin America, education centre for Adivasis and Dalits in India, the Cristo Rey and Nativity Schools in the USA and the work of the Jesuit Refugee Service. He contends that there is thus a direct connection between the ideals of the first Jesuits in education and the service offered by the order to the poor and marginalized.

⁹² *Ignatian Pedagogy: A Practical Approach* (1993), in *The Ratio Studiorum: 400th Anniversary Perspectives*, ed. by Vincent J. Duminuco SJ (New York: Fordham University Press, 2000), pp. 231-291.

implementation becomes more difficult. It also necessarily depends on the availability of suitably qualified staff. This is a huge challenge in ‘frontier’ areas. In countries where Jesuit education for the wealthy remains highly popular, the perceived dichotomy between the two types of education – for the rich and for the poor – will not be easy to eradicate.

Yet implementing Decree Four in education involves integrating the social and education apostolates. This means ensuring that *educación popular* is not a poor relative to education for the privileged, and that it has the resources to promote integral development as envisaged by *PP* as well as Christian leadership and social transformation in order to address less than human conditions. The exploration of Ignatian-inspired FBOs in the following chapters will tell us how this can be attempted, and with what results.

2.3 Conclusion

The teaching of youngsters has been an essential part of the Jesuit mission/charism since its inception, first informally as directed in the Formula, then in formal settings. This was understood as a work of evangelization – teaching Christian doctrine and values – but also as a service for the common good. The integration of the social and the education apostolates as a service to the poorest and more vulnerable has grown gradually during the twentieth century in parallel with the development of CST. The work of Hurtado in Chile and his accent on *responsabilidad social* is a prime example of this development. A sense of social justice based on a better understanding of social conditions was also advocated by Jean-Baptiste Janssens and Pedro Arrupe as a work of love of God and neighbour. Decree Four, with the same understanding, rephrased it as the promotion of justice. In all Church documents of the period, education occupied a central role in the ideal of liberating the oppressed from less than human conditions. In Latin America, the emergence of *educación popular* fulfilled that role and was particularly in line with the tradition of the Society. The call for radical structural change and the rise of liberation theology suggested new pedagogies for individual and social

development, some of them bearing the danger of political and social confrontation. Various influences, from the fading of liberation theology to the advent of conservative governments, from Vélaz's conservative Christian vision of education to Medellín's *educación liberadora*, have contributed to containing it and co-opting it within the Gospel message of peace and justice. Confronting sinful structures means denouncing corruption and exploitation, using advocacy where necessary, but not necessarily challenging the overall *status quo* as seemed possible, even desirable, half a century ago. Social transformation now means a fairer distribution of goods, solidarity as a Christian virtue, advocacy, democracy and participation in the political process, universal wellbeing and what Sen would call the freedom to develop all one's capabilities – an important aspect against which to evaluate the work and impact of Ignatian FBOs.

In spite of the disparity that endures between *educación popular* and the education of privileged children, integrating the social and the education apostolates remains the goal. The Second UAP reminds us of the needs of poor, marginalized indigenous populations.⁹³ Their children live in less than human conditions still. Educating them is a priority, a work of justice *par excellence*. The next chapter will follow an example of Ignatian educational praxis for justice, focussing on Fe y Alegría from its challenging early days to its growth into an international movement proud of working for social transformation across Latin America and beyond.

⁹³ UAP, Second Preference: 'Walk with the poor, the outcasts of the world, those whose dignity has been violated, in a mission of reconciliation and justice.'

Chapter 3. The praxis of *educación popular* and the Society of Jesus: Fe y Alegría

He held the firm conviction that the Society had largely lost its daring and this missionary spirit that pushes it always to seek new and more dangerous frontiers.¹

An anniversary is an opportunity to celebrate past achievements, assess current challenges and articulate a vision for the future. The fiftieth anniversary of Fe y Alegría Ecuador in 2014 was such an occasion. It explored the tenets of *educación popular*, reaffirming their continued relevance in the face of the challenging socio-economic and political context of 21st century Latin America. It then focused on the present and future role of FyA on the Ecuadorian education scene. This chapter follows a similar pattern. The foundation of FyA and the founder's ambivalent relationship with the Society of Jesus in Venezuela highlight different perspectives of the practical realities of mission: personnel issues, financial considerations, and the radical political implications of *educación popular* in the days of Freire and liberation theology. The focus then shifts to Fe y Alegría Ecuador, from its unpromising beginnings to the implementation of its vision and its relationship with the Jesuit authorities in the Ecuadorian Province. This exploration highlights FyA's eclectic roots in philosophy, theology and pedagogy which reflect the turbulent times of its early days: from Medellín to Puebla, from liberation theology to Decree 4, from the Ignatian Pedagogical Paradigm to Dewey and Freire. Finally the various challenges and opportunities that now face the organization will be analysed, in particular its relationship with the state and the articulation of its Christian spirituality. A methodology will then be proposed to study the implementation of these initiatives as an essential work of justice with children.

¹ Antonio Pérez Esclarín, *Yo, José María Vélaz*, 2nd edn (Quito: Federación Internacional de Fe y Alegría, 2011), p. 16.

3.1 The early days

3.1.1 Foundation and gradual expansion (1955-1970)

The foundation of FyA by P. José María Vélaz SJ was originally a pragmatic, unplanned response to the plight of illiteracy and extreme poverty in Venezuela following the unexpected offer of small private premises in a Caracas *barrio*. Several accounts of Vélaz's life and the early days of FyA are available, most of them from Venezuela.² All depict the man, his background and Jesuit identity, his vision for educational justice, dealing honestly with the passion and intransigence that created endless tensions between him and his order. There are differences in emphasis, with some accounts focussing more on the founder and others on the foundation of FyA. But they all mainly follow chronological developments without major differences in interpretation of the man and his work. The most recent publication, Joseba Lazcano's *José María Veláz, Jesuita*,³ is of particular interest inasmuch as it focuses on the relationship between the Society of Jesus and Vélaz, 'rebellious Jesuit-obedient Jesuit.'⁴ Lazcano's account highlights the interaction of the different perspectives involved: that of an individual with vision and passion versus the wider responsibilities of those

² Fey Alegría has published Vélaz's writings on education (in Spanish) on its website (Library Section: El Fundador), <<http://www.feyAlegría.org/es/biblioteca/el-fundador>> [accessed 27.12.2019]. Works on Vélaz's life and work also draw on letters and other writings not yet available in the UK either in print or electronically at the time of writing. Several publications focus on the foundation and early development of Fe y Alegría. They include in particular two works by Ignacio Marquínez Calleja, SJ: *¿Cómo Nació Fe y Alegría?: 1955-1980* (Caracas: Federación Internacional de Fe y Alegría, 1987); and *De la chispa al incendio: la historia y las historias de Fe y Alegría* (Caracas: Federación Internacional de Fe y Alegría, 1999) with a first chapter dedicated to Venezuela by José Luis Sáez, SJ (pp. 19-79). Antonio Pérez Esclarín's *Raíces de Fe y Alegría: Testimonios* (Caracas: Fe y Alegría, 1999) draws on testimonies from those involved in the movement in the early years. His *Yo, José María Vélaz* presented as an interior monologue, gives a more introspective presentation of the man and in particular his perception of his difficulties with his own Order.

³ Joseba Lazcano Uranga, SJ, *José María Veláz, Jesuita* (Bogota: Federación Internacional de Fe y Alegría, 2018) is based on historical documents of both Fe y Alegría and the Society of Jesus as well as Vélaz's own writings.

⁴ Lazcano, p. 10.

in charge of the good management of resources and responsible for discerning worthwhile initiatives from dangerous flights of fancy. The third part of the book, the author quips, could well have been entitled ‘Confrontation between the ways of proceeding of the Society and Fe y Alegría.’⁵ Lazcano’s chapter titles reflect the uncertainties of the whole enterprise: ‘Fe y Alegría: the undertaking of a solitary man?’, then ‘Fe y Alegría: the work of the Society?’ before we finally reach ‘Yes, FyA is a work of the Society’.⁶

The first FyA school was launched in 1955 shortly after a savings bank supported by the Society of Jesus in Venezuela collapsed, leaving millions of dollars of debt. Although the Society’s responsibility in the venture was a moral rather than a financial one, some contribution had to be made in redress and the fear of a new financial fiasco overshadowed the fledgling FyA for many years. Having already in the past approached his superior about possible new schools for the poor and been rebuffed for being ‘quixotic’, Vélaz this time started more or less without authorisation – partly for fear of a refusal, partly because he was not sure that the idea would work.⁷

This goes a long way to explaining the ambivalence that followed on both sides. Three months after the Society agreed to manage FyA, the *News of the Province* stated that FyA, although launched and overseen by P. Vélaz, was run by laymen and *not* a work of the Society in Venezuela.⁸ Nine years later, with 17 schools running, economic viability remained a major concern for the order and attempts were made to remove Vélaz from the executive leadership of FyA. Following a meeting in Rome between Vélaz and Pedro Arrupe, the latter also pointed out the need for sound economic planning and fair remuneration for teachers.

⁵ Lazcano, p. 67.

⁶ Lazcano, titles of Part II, Chapters 1 (p. 30), 3 (p. 35) and 5 (p. 41).

⁷ Lazcano, p. 32.

⁸ Lazcano, p. 35.

Vélaz himself was ambivalent about placing the Society in charge of FyA. The *mística* of the new movement, this link between spirituality and commitment to a cause,⁹ was an Ignatian response to the needs of his place and time, totally in line with the Formula. He feared that bureaucratization would dull the ‘vigour and audacity’¹⁰ of the fledgling FyA. Nonetheless, he was well aware of the advantages and opportunities of being affiliated to the Society. This is why, in spite of the difference of views, he always ensured that FyA was ‘attached to the Society, [giving] the Society the final say on how FyA should proceed.’¹¹ As FyA expanded abroad, he would always go first to the Provincials, insisting that the statutes of each new foundation should clearly state its *dependencia jesuita*. This meant that the Provincials would name the national director and control a number of appointments on the Board of Directors. Nonetheless, few Jesuits showed interest in the new venture until the Society’s commitment to the promotion of justice increasingly came to the fore. This signalled a growing Jesuit involvement both in FyA and IRFEYAL, its broadcasting branch.¹² Other religious orders also became involved in managing individual FyA schools at that time. The 1969 Survey General of the Vice-Province of Venezuela judged FyA to be ‘a real and effective attempt of coming nearer the people by means of educational development.’¹³ For Jesuits committed to searching new orientations in the promotion of social justice, FyA was potentially an initiative to be fully supported, a recovery of the original spirit of the Institute and its adaptation to modern times. But the ambiguity of the concept of social justice meant that developments were going to be a great deal more complex.

⁹ See Section 2.6 above.

¹⁰ Lazcano, p. 41.

¹¹ Vélaz, 1966, quoted in Lazcano, p. 42.

¹² IRFEYAL (*Instituto Radiofónico Fe y Alegría*,) was founded in 1974 and run according to the model of Radio ECCA, a Jesuit *educación popular* initiative in the Canary Islands. It continues to provide long-distance education for adults and now also offers formal courses leading to diplomas.

¹³ ‘Survey General’ quoted in Lazcano, p. 50.

3.1.2 Implementing Decree Four in education

The general principle of educating poor children as a work of mercy was laid out in the First Formula. But the particular story of FyA is the story of the incarnation of the social and education apostolates in a very specific context: Latin America in the days of Vatican II and Medellín, the 1971 Bishops' Synod and GC 32, the rise of liberation theology and the fear of Marxism. In connection with the latter in particular Vélaz was concerned that insufficient weight was given to education as a source of injustice:

We do not between us have enough information to demonstrate the close relationship between social and structural injustice and the educational injustice suffered by the poor. Thus we do not fully feel the urge to fight the injustice inflicted on the poor in education: injustice perpetrated by the state, injustice perpetrated by the Church and injustice perpetrated by the Society. Educational injustice is at the root of the current social injustice and the sturdiest bulwark against structural justice.¹⁴

Attending the first Latin American Convention of Jesuit educators in 1976, Vélaz again complained that too little time was spent on discussing the education of the poor; and he wondered who would evaluate the educational implications of Decree Four.¹⁵ The answer for him came two years later. An inspection of the FyA centres was, at his own request, organized by the Society. The lead inspector chosen was an educationalist trained in the Freirian mould. A number of issues were identified, including a high dropout rate, overcrowded classrooms, poor care of staff and low remuneration of teachers. But most damning of all was the judgment that

¹⁴ Lazcano, p. 53.

¹⁵ Vélaz, quoted in Lazcano, p. 51. On this occasion he had complained of the limited amount of time spent on discussing 'possible full programmes for the education of the poor. This field was practically a forbidden zone. Why?' (p. 51).

FyA was an initiative

arising from *mística*, from audacity and generosity rather than a well thought-out, sound plan. [...] Within an unjust system, the work collaborates with the marginalized, but it achieves neither individual nor structural change ... almost no school believed it had the right to position itself as a school that sets a people walking and that is changing unjust socio-economic structures.¹⁶

This judgment, made according to Freirian criteria, focussed more on the socially transformative aspect than the quality of education as such. In Vélaz's view it neglected the apostolic impact and ignored the fact that *mística* –the link between spirituality and the social apostolate – at the very root of the movement, is by definition something that cannot be planned.¹⁷ The difficult part, though, would not have been accepting the impossibility of reconciling *mística* with the cold reality of financial planning and management. It would, rather, have been the failure of the transformative effort of the enterprise. And Pérez Esclarín's Vélaz wonders: 'and do the other works of the Society then manage to achieve this change?'¹⁸ Part of a supposed interior monologue, this remark nonetheless highlights the question marks relating to the application of Decree Four in education then and now, and the transformation it can hope to achieve.

This inspection report – and Vélaz's predictable reaction to it led to a serious confrontation with his Provincial – brings to light all the themes, all the dilemmas already hinted at above: the potential of education for social transformation; the extent and nature of the transformation expected and achieved; and ultimately, the question of whether such change, if not radical, really creates a more just society for all, or whether it simply transfers a few individuals from the masses into the elite. The 'mass vs. the elites' issue is one of which Vélaz seems to have been acutely aware, both in terms of the social apostolate and, more particularly, in terms of its

¹⁶ Inspection Report quoted in Lazcano, p. 60.

¹⁷ Lazcano, p. 60.

¹⁸ Pérez Esclarín, *Yo Vélaz*, p. 242.

integration with education. Regarding the former he had already written in 1966:

The ministries of the Society are still services for small, almost closed circles, with little capacity to extend to the greater mass the good that we provide. These circles have almost totally lost their historical mission. We have to reach apostolically the large sectors of the masses.¹⁹

As regards education he believed, as noted, that structural injustice was directly related to the lack of justice in education: namely, the fact that the poor did not receive an education, or at least not an education likely to enable them to leave behind less than human conditions. In this context he considered the Society to be doubly guilty: guilty first for having catered for the elites over the masses, guilty again in the light of Decree 4 for continuing ‘to take refuge in the small islet of education for the privileged’.²⁰

The Society still sees educating the poor as something of an exception, reserved for a few Jesuits with the right quantity of kindness and intellectual shortcomings ... as if Jesuit education in its fullness was somehow unduly wasted by assigning worthy subjects to work with the poor and even more, to educate the poorest.²¹

Vélaz was deeply convinced that ‘only educating the masses will make it possible to open the way to justice for a new society, coordinating in the process the formation of agents of change prepared to organize and direct the political power of these very masses.’²²

Couched in near-Freirian language, these passages underline the complexity of defining even in a specific context the true nature of transformation, the *reformatio mundi*, which educating the poor could achieve. Vélaz’s understanding in this respect is not that of Freire. It is maybe more akin to Medellín’s concept of *educación liberadora*, inasmuch as it equates

¹⁹ Vélaz, quoted in Lazcano, p. 68.

²⁰ Vélaz, quoted in Lazcano, p. 70.

²¹ Vélaz, quoted in Lazcano, p. 54.

²² Vélaz, quoted in Lazcano, p. 70.

education for all to a just society where the downtrodden are free from the yoke of oppression. Thus Vélaz's concern about the implementation of Decree Four in education was not the fear that it might be 'watered down' by *educación popular*. It was, on the contrary, that the Society might not implement it to the true extent demanded by the service of faith and the promotion of justice. But his opposition between the education provided to the privileged and that granted the masses takes us back to the dilemma highlighted by Segundo (2.7 above). Vélaz may not speak of *concientización*, but his aim is to form people who can participate in civic life and even leaders coming from their own ranks. This is of course in the Ignatian tradition, but Segundo's point about *concientización* also applies to leadership: not everyone can be a leader. Thus with or without the concept of *concientización* and its political overtones the 'mass-man' vs. 'elite-man' conundrum remains. And if Segundo is right that Freire's awareness-raising is not a tool for the masses, what is the right methodology to achieve social transformation? FyA was drawing its pedagogy from two traditions: the Ignatian formulation of a Christian substrate was gradually being subsumed into an increasing reliance on Freire. A clear formula was going to be necessary to keep FyA as a Christian enterprise eschewing what Vélaz saw as the ideological dangers of the new theology of 'liberation' which was emerging.

3.1.3 The impact of liberation theology

In Latin America, Fe y Alegría's preferential option for the poor placed it very much in line with the agenda of social justice proclaimed by Medellín and Puebla and the reading of the Gospel proposed by liberation theology. For this reason, it was probably inevitable that, in the 1960s and 70s, it should have become a battleground between extremes. For it could appeal equally well to those who understood Gospel justice as demanding radical structural change and those who, like Vélaz, feared the influence of Marxism and railed against the new theology that made it 'impossible to

love the poor without hating the rich'.²³ Pérez Esclarín has sketched FyA's history against the background of the political and theological upheavals in Latin America in the second half of the 20th century. He identifies three positions – conservatives, progressives and moderates – already discernible, he says, at GC31 and which were 'gradually becoming more pronounced and later to clash mightily.'²⁴ Already in the late 1960s Vélaz was being described by some younger Jesuits as too conservative, too authoritarian. He responded by denouncing the newcomers' Marxist leanings, an accusation that was being levelled not just at liberation theology but also at *educación popular*.

The renewed commitment of the Society to the poorest after GC 32 did not mark an end to the conflicts. Pérez Esclarín recalls how the clashes between different ideologies came to a head at a Venezuelan conference in 1977. Vélaz was concerned that 'the new faith-justice commitment of GC 32 was being channelled rather towards other intellectual and ideological directions.'²⁵ This was directed at Marxist-inspired theologians who sought 'other principles of salvation which, in an environment of laziness and bold condescension, convert us into comfortable liberators of the oppressed classes.'²⁶ Consequently Vélaz demanded that two basic principles should apply to FyA: the continuing commitment to serve the poorest and an explicitly Christian response to injustice. He won the day. Agreement was eventually reached on the first *Ideario*, the statement of principles which rooted the promotion of justice in education firmly as a Christian mission. The second *Ideario*, along the same lines, was drawn up in 1985 and also maintains as a first principle the identity of FyA as 'a movement of *educación popular* born of and motivated by Christian living in the face of

²³ Lazcano, p. 70.

²⁴ Antonio Pérez Esclarín, 'Algunas notas sobre la identidad de Fe y Alegría' in *Revista Internacional de Fe y Alegría: Identidad y Espiritualidad al servicio de la misión*, no. 13 (Bogotá: FIFYA, 2012), 75-94 (p. 109).

²⁵ Lazcano, p. 51.

²⁶ Lazcano, p. 58.

situations of injustice ... aiming to build a more just and fraternal society.²⁷ The second principle states FyA's continuing faithfulness to the option for the poor and its focus on providing education and social development to those most in need.

Thirty years later, memories of past differences are still raw. Participants of the 2014 FIFYA Congress were reminded that the call to build a plural, equitable society should not be understood as a call to 'take up again with renewed vigour the banner of liberation theology, which in its day raised so many fears and so many doubts'.²⁸ In this sense, a degree of sanitisation of the movement's history has been necessary for its mission to continue – and to continue according to its founders' vision. The carefully crafted definitions proposed by the *Ideario* reflect this. The meaning of transformation has been remoulded according to a Gospel message of love and peace, a message that spells hope to the needy but is politically uncontroversial and can blend together Christian and neoliberal aspirations to democracy and political participation. This shapes the education provided by Fe y Alegría as well as that offered in private Jesuit colleges. As regards *educación popular*, however, it leaves open several questions. The first is that of the balance between 'the most needy' – the frontier – and the rest when resources are scarce. The next is how to adapt the curriculum and pedagogy for such circumstances. The means and method of evaluating the education provided by FyA beyond raw academic results also need articulating.

²⁷ *Ideario* in *Pensamiento de Fe y Alegría: Documentos de los Congresos Internacionales 1984-2007*, ed. by Federación Internacional de Fe y Alegría, (Santo Domingo: Fe y Alegría, 2008), p. 11-18 (p.15). FIFYA dedicated two conferences in 2011 and 2012 to re-stating the movement's identity as the cornerstone of its mission.

²⁸ Ignacio Suñol SJ, 'Palabras de bienvenida', *Revista de la Federación Internacional de Fe y Alegría: Educación inclusiva en la misión de Fe y Alegría*, 15 (2014), 11-15 (pp. 12-13)

3.1.4 FyA and *ignacianidad*

Traces of past frictions were clearly detectable in conversations with both P. Fabricio Alaña SJ, the Ecuadorian Jesuit Delegate for Education and Carlos Vargas, National Director of FyA Ecuador. Whilst these conversations relate more particularly to the situation in Ecuador, the warning against taking up again the banner of liberation theology shows that, regardless of national idiosyncrasies, the issues raised apply equally everywhere.

Padre Alaña is clear that FyA as a work of the Society has ‘now obviously been accepted as the will of God’.²⁹ He explained that from the Society’s point of view, its continued involvement in FyA is based on the Ignatian nature of that movement, a feature than can be shared with and by everyone. Quoting both *Evangelii Gaudium* and *Laudato Si’* he emphasized the joy of a creation made for all. A practical consequence is the duty to accept students and staff from different denominations, from other faiths and none. As FyA’s National Director, Alaña had already outlined his vision of the Society’s involvement in FyA and *educación popular* as deriving from an Ignatian worldview: ‘What unites this Ignatian family involved in education, be it formal or non-formal, *educación popular* or other education, is the spiritual experience of our mission from a vision which describes itself as Ignatian.’³⁰ In this connection he identified specifically four characteristics:

- the need to pursue the *magis* and refuse to accept injustice rather than simply conforming;
- the necessity of constant discernment against self-delusion and the trappings of consumerism and a utilitarian society;

²⁹ Padre Fabricio Alaña was National Director of FyA Ecuador from 2002 to 2005 and remains the main point of contact between FyA and the Society. Private conversation quoted with permission.

³⁰ Fabricio Alaña Echanique SJ, ‘Presentación: Ignacio pretendía’, in Andrea C. Ramal, *Carta de San Ignacio de Loyola a un educador de hoy*, Colección Pastoral Fe y Alegría, 5 (Fe y Alegría Ecuador: Quito, 2003), 5-8 (pp. 6-7). Considering Jesuit education as a whole in this light, P. Alaña saw no difficulty in adapting the approach, even to making it less explicitly Catholic or even Christian, in order for Christians and non-Christians alike to be able to enjoy its benefits.

- the need for differentiated strategies to support every human being in communicating with its Creator and Lord; and
- friendship with the poor that will make us friends of the Lord.

These characteristics shape people whose faith inescapably leads them to action against injustice: ‘Faith seeks to understand, faith moves us to love and this love is political, organizing, full of hope. This requires prophetic people able to denounce prevailing injustice ... educational injustice, in our case, that demands quality education for the people.’³¹ FyA Ecuador understands this ‘political’ action – advocacy and a prophetic denunciation of injustice based on the Gospel – as remaining at the very heart of its mission, and part of its ‘unconditional faithfulness to our identity.’³²

Implementation, however, is fraught with difficulties. The three positions identified above – conservative, moderate and progressive – have not disappeared. In Ecuador they are still extant in the Society and the resulting tensions are very much in evidence, both at personal and institutional level. *EG* 100 was mentioned as relevant in this context.³³ This inevitably impacts on attitudes to FyA within the Province and consequently, on policies and the prioritization of resources. Alaña also fears that the Society has failed more generally, in Ecuador, to transmit the full Ignatian dimension of its educational vision, and this both in *educación popular* and the private schools. This he attributes to a failure to give the proper ‘method and

³¹ Fabricio Alaña, quoted in Luis Fernando Granados Ospina SJ, ‘Fe y Alegría entre la tradición y los retos del ser futuro: construyendo identidad’, *Revista Internacional de Fe y Alegría: Identidad y Espiritualidad vividas en misión*, 12 (2011), 105-114 (p. 12).

³² Luis Túpac-Yupanqui, ‘La Educación Popular en el Ecuador de hoy: contextos, problemáticas, modelo de respuestas y retos, desde la perspectiva de Fe y Alegría’ in *La Educación Popular ante los nuevos contextos latinoamericanos y el sistema educativo ecuatoriano*, ed. by Antonio Narváez, Milton Calderón y Vicente Palop (Quito: Fe y Alegría, 2015), 117-129 (p. 128).

³³ ‘Those wounded by historic divisions find it difficult to accept our invitation to forgiveness and reconciliation, since they think that we are ignoring their pain or are asking them to give up their memory and ideals. [...] It always pains me greatly to discover how some Christian communities, and even consecrated persons, can tolerate different forms of enmity, division, calumny, defamation, vendetta, jealousy and the desire to impose certain ideas at all costs, even to persecutions which appear as veritable witch hunts. Whom are we going to evangelize if this is the way we act?’ *EG*, 100.

order’,³⁴ a failure in mystagogy. In his view the implications are profound in terms of integral formation and are bound to affect the transformational impact of education, private and public, both at individual and at society level. In spite of these difficulties Alaña, like other Jesuits committed to FyA in Latin America and beyond, remains convinced by the *mística* of FyA. There was no mention of either financial difficulties – they have occurred in Ecuador – or the ambiguous situation whereby the Society still names the national Director of the movement but does not otherwise involve itself in running it.

At operational level Carlos Vargas, the Director of FyA Ecuador, sees *ignacianidad* incarnated in FyA in a different way.³⁵ For him, it is expressed primarily in the ability to be open to all regardless of social, ethnic or religious background. It is also very much in evidence in the willingness to welcome the different religious charisms and lay participation that make up the FyA family working together for equality and social justice.³⁶ ‘Spirituality’, for Vargas, lies in this vision as the basis for practical implementation, and FyA Ecuador promotes spirituality as independent of any religious worldview. The underpinning of the vision remains determinedly Christian, but its implementation does not depend directly on any particular pedagogical or religious approach. The accent, however, remains firmly on social transformation. There is a potential contradiction here between a vision that declares itself determinedly Christian and based on Christian experience but not directly dependent on a particular religious approach. We shall return to this point when reflecting on the case studies (see Section 9.4).

³⁴ Annotations 2, *Saint Ignatius Loyola: Personal Writings*, trans. with introduction and notes by Joseph A. Munitiz and Philip Endean (London: Penguin Books, 1996), p. 283.

³⁵ Private conversation quoted with permission.

³⁶ A proportion of FyA schools have been entrusted to the management of other religious orders that also bring their own charism to the movement. This aspect did not come to the fore in the conversation with Alaña.

3.1.5 An Ignatian pedagogy?

The conversations above focussed mainly on the incarnation of Ignatian principles generally, leaving aside their influence on pedagogy. The 1978 inspection report of FyA centres gives us an indication of the pedagogical methods as assessed by an independent – although not necessarily unbiased – observer. The methods used seem to have been conventional methods of teaching literacy and numeracy as well as providing ‘health services’ and summer camps outside the city (the former now provided by the state, the latter a tradition dating back to the early days and still very much alive). And the limits of social transformation at that time are also clear from the report.

This seems to indicate that FyA, even if it had incorporated *educación liberadora*, had certainly not at that time adopted Freire’s pedagogy. It should not be forgotten that the movement was launched and started expanding thirteen years before Medellín, and Vélaz would never have accepted Freire’s pedagogy at a time when it had clear Marxist connotations. As for Ignatian pedagogy, *The Characteristics of Jesuit Education* were formulated thirty years later and *Ignatian Pedagogy* not before 1993. According to Rafael García Mora, FyA’s distinctive approach to education is due to the fact that it was ‘based first of all on the “Ratio Studiorum”’, later enhanced and adapted thanks to the philosophy and ideas of more recent thinkers, such as Paulo Freire.³⁷ But regardless of the accuracy of these comments regarding the use of the Ratio Studiorum in *educación popular*, FyA’s documents do highlight its eclectic approach to formulating both its philosophy and its pedagogy. Claiming the need for ‘creativity’³⁸ it does draw both on Ignatian pedagogy and on Freire – but Freire as remoulded by Medellín and Puebla, making social transformation the fulfilment of the Gospel message, a work of peace rather than

³⁷ Rafael García Mora, SJ, ‘Educating with indigenous wisdom and world vision’, *Promotio Iustitiae* 114/1 (2014), 14-19 (15). P. García was at the time of writing National Director of FyA Bolivia.

³⁸ *Ideario*, p. 12.

revolution. Thus the International Federation's 1985 *Ideario* lists as the main objectives of *educación popular* applying in particular to formal education:

- promoting both individuals and communities so they can become 'protagonists' of their own development and make decisions on their own lives and future (the glossary specifies that this is, 'according to Medellín's definition, a pedagogy which makes learners into the subjects of their own development');³⁹
- ongoing reflection and action (*concientización* is used but 'reflection' is the preferred term) making learners aware of their potentialities as well as the local/national reality of FyA;
- analysing this reality in the light of the Gospel and 'according to Puebla, transmitting the Good News of Christ's Kingdom that brings liberation particularly to the most in need ... witnessing to the Gospel in everything' and giving to all a personal experience of God;
- educating the whole person (*educación integral*);
- providing *educación liberadora* and evangelization.⁴⁰

The outcome of this education will be a 'new man' (sic) 'aware of himself and his personal liberation towards a full development of his capabilities',⁴¹ living a Christian life, having developed autonomy, critical independence and responsibility, committed to serving others and an agent of change for social transformation. The political formation deriving from *concientización* or reflection on reality, an important aspect, is now presented as 'learning to be citizens': we shall return to this in connection with the FyA case study (Chapter 8). The 'new society' will be just, participative and fraternal. The right to an education chosen by the learners and their parents is also part of FyA's vision.

³⁹ *Ideario*, pp. 15-18.

⁴⁰ *Ideario*, pp. 16-17.

⁴¹ *Pensamiento*, p. 25.

Both the Ignatian grounding and Freire's influence are clearly detectable in this list. FyA's *Ideario* does not, like the 1993 *Characteristics of Jesuit Education*, place God explicitly as the absolute reality from which all else derives. But it does speak of transmitting the Good News to the most in need, thus incorporating the faith and justice dimension. Just as Jesuit education encourages a realistic knowledge of both self and the world, so FyA insists on analysing reality in the light of the Gospel. The link between reflection and action is clear in the *Ideario* as it is in Ignatian pedagogy: 'The aim of Jesuit education is [...] that full growth of the person which leads to action'.⁴² The Ignatian ideal of academic excellence is also echoed in FyA's drive for quality education. The formation of the whole person, the option for the poor and the quest for social justice are of course not the preserve of Jesuit education but, rather, a characteristic of Christian education in general. But the 'constant interplay of experience, reflection and action'⁴³ derived from the *Spiritual Exercises* and characteristic of the Ignatian paradigm, the determination to 'find those means and methods that will best accomplish the purposes of the school and implement its educational philosophy'⁴⁴ and to make changes accordingly when necessary, are also reflected in the definition of *educación popular* listed above.

'Critical education starts from a profound sense of dissatisfaction with an unjust society and a desire to transform it'⁴⁵ writes the educationalist José Ibáñez. He adds, significantly, that adopting a critical pedagogy 'does not require agreeing on one ideal model, or even having a comprehensive alternative already set up, but only sharing the same utopian outlook to overcome the limitations of the present.'⁴⁶ This lack of a comprehensive alternative already set up could be a weakness. In the case of FyA, however,

⁴² *Ignatian Pedagogy*, 12, p. 240.

⁴³ GC 33, D. 1, nn. 42-48, quoted in *Ignatian Pedagogy*, 22, p. 245.

⁴⁴ *The Characteristics of Jesuit Education*, 145, p. 209.

⁴⁵ José Emiliano Ibáñez Herrán, *La educación transformadora: concepto, fines, métodos*, (2003), Section 1 a), i-Book at <www.jei.pangea.org/edu/f/edu-trasnf-conc.htm> [accessed 10.09.2019].

⁴⁶ José E. Ibáñez Herrán, *La educación transformadora*, Section 1 a).

it seems rather to have been a strength. In an *educación popular* context the educationalist Andrea Ramal, describing her use of Ignatian pedagogy in a Jesuit non-formal education project in Brazil, depicts the teacher's role as forming 'agents of social transformation, thoughtful, critical thinkers drawn to promoting justice.'⁴⁷ Ramal's integration of the Ignatian paradigm and Freire's pedagogy in non-formal situations points to a possible synergy between the two, an aspect which has not been fully explored.⁴⁸ In the *Ideario* this is expressed in terminology which stresses the importance of social awareness as a tool for developing the agency that turns learners into subjects of both individual and social transformation. In this sense they are not entirely new. These same aspects, with the clear connection with Dewey, were already an essential component of Hurtado's views on education for social transformation. The unmentioned *sine qua non*, though, is the availability of suitably trained teachers. This, in 'frontier' settings, is likely to be highly problematic.

3.2 Fe y Alegría today

3.2.1 An international federation

As FyA schools spread to different countries – Ecuador, Panama a year later, Peru and Bolivia soon after – different models and *modi operandi* began to emerge in response to the local culture and the policies of both the Jesuit Province and the state concerned. FyA's relationships with the Society inevitably vary according to the Province's choices and the resources available. All countries are affiliated to FIFYA, the international federation, and all are expected to subscribe unreservedly to the vision and mission of the movement as formulated in the *Ideario* and lived in the *mística*. Thus the determination to denounce injustice, the loyalty to

⁴⁷ Andrea C. Ramal, 'Enseñando a pensar, incitando a actuar: Relato de una experiencia pedagógica' in *Educación para Transformar*, CD-ROM, (São Paulo: Loyola, 2003), p. 4. The project described here was aimed at low-income youngsters and adults.

⁴⁸ The Society accepts the use of 'participative pedagogy' in centres of non-formal education (GC 34, D. 18, n. 4).

‘transformative intentionality’, the belief in advocacy to redress wrongs and journey with the poor all apply across the movement. Nonetheless, each national organization operates independently and fulfils a different role in the educational system of its own country; and relations with the Society can vary a great deal. This to some extent will affect how each national organization implements the vision and the outcomes it can expect.

At time of writing there are FyA schools or education centres in 17 Latin American and Caribbean countries as well as Chad, Madagascar, Spain and Italy (Ecuador alone has 77 centres). FyA has more than 40,000 staff worldwide involving lay and religious collaborators from more than 170 different congregations. They serve over one million people.⁴⁹ In most cases, including Ecuador, FyA centres operate on a system akin to that of voluntary-aided schools in the UK: the Church or religious order provides the premises/buildings while the state funds the staff’s salaries. Obtaining a degree of state funding for Catholic education is considered in many countries to be one of FyA’s achievements. This change notwithstanding, Vélaz’s original statutes whereby the Society appoints the Executive Director still stand. In terms of curriculum, however, state funding means that FyA centres have to teach the same curriculum as other schools. At a time when education left a great deal to be desired in many countries FyA tried to make its mark by stressing quality and a concern for integral development rooted in a Christian worldview. It has since the 1980s invested in evaluation schemes and staff training on strategic planning and management as well as teaching and learning.⁵⁰ It stresses the need for creativity and innovation and devises its own methodology as an alternative to the methodology proposed by the state or put forward by indigenous

⁴⁹ *Faith-Based Schools in Latin America: Case Studies on Fe y Alegría*, ed. by Juan Carlos Parra Osorio and Quentin Wodon (Washington DC: The World Bank, 2014), p. vii.

⁵⁰ Publications regarding these different aspects are available on the FyA website, <<https://www.feyAlegría.org>> [accessed 28.10.2019]. For strategic planning see *La Planificación estratégica en Fe y Alegría: Orientaciones Metodológicas* (Santo Domingo: Federación Internacional de Fe y Alegría, collection Fortalecimiento de los sistemas de gestión y sostenibilidad institucion, 6, <http://www.feyAlegría.org/images/acrobat/La_Planificacion_Estrategica_en%20FyA_14155.pdf> [accessed 16.11.19].

organizations for use in bilingual intercultural education centres. The most recent methodological framework (2017) is CORDIS. Its key components – contextualization, renewed appreciation of different traditions of knowledge and experience, dialogue between these various types of knowledge, innovation for transformation, systematization and socialisation⁵¹ – again bear witness to the influence of both Ignatian and Freirian approaches. The Ignatian paradigm is also reflected in FyA’s emphasis on spirituality and Christian values including a programme of formation to Christian leadership which starts in primary school.

Implementing this agenda in a ‘frontier’ setting is a challenge, as we shall see. But the emphasis on quality has demonstrably borne fruit in many contexts. In Peru Jeffrey Klaiber noted in 2013 that ‘the moral and educational level in [FyA and parish] schools is notably superior to that of the state schools, and it is only the conditions of poverty in which the children live that hold them back from attaining an even higher cultural level.’⁵² In Ecuador the government in 2014 was sufficiently convinced of the quality of FyA’s education to sign an agreement increasing its funding and subsidising in addition an accelerated course towards the baccalaureate for adults up to 25 years of age. And the conclusions of the World Bank case study on *Fe y Alegría*, which focussed on schools in Venezuela, Colombia and Peru,⁵³ are in stark contrast with the 1978 Inspection Report

⁵¹ *Contextualización, Revalorización de saberes, Dialogo de saberes, Innovación transformadora, Sistematización/Socialización*. The reference to a dialogue between different traditions of knowledge (*saberes*) also relates to the education of indigenous students, especially in intercultural bilingual centres.

⁵² Jeffrey Klaiber, SJ, ‘Fe y Alegría in Peru: Solidarity and Service in Catholic Education’, *International Studies in Catholic Education*, 5/2 (2013), 144-160. See also ‘The Battle over Private Education in Peru, 1968-1980: An Aspect of the Internal Struggle in the Catholic Church’, *The Americas*, 43/2 (1986), 137-158.

⁵³ The World Bank study on Venezuela notes that ‘although religiosity was initially important, individual schools now vary substantially on that measure, with some schools run by nuns and others exhibiting little sign of Catholic influence.’ *Faith-Based Schools*, p. 19. In the case of Peru it reports that FyA education ‘has the reputation of being of better quality than that provided by public schools.’ (p. 55).

that so angered Vélaz. They read:

The available quantitative evidence suggests that the federation's schools often do reach the poor, and that students in Fe y Alegría schools tend to perform as well on test scores, if not slightly better than comparable students in other schools. Qualitative data and case studies suggest that the factors that lead to good performance are complex and related not only to the types of "inputs" or resources used by the schools in the education process, but also to the management of these resources, and the ability to implement and test innovative programs.⁵⁴

The World Bank report focusses on facts and figures, assessing the academic development of pupils purely in terms of test scores outcomes. It is wary of including any judgement involving religious factors.⁵⁵ But it does acknowledge the importance of values such as consideration for others and long-term commitment to the community as factors positively influencing the performance of the schools.

3.2.2 A 'diversity of places, times and persons': FyA Ecuador*

Ten years after the opening of the first school in Caracas, Ecuador was the first foreign country where Vélaz considered establishing FyA and he approached the Ecuadorian Jesuit Provincial in 1964. The Province had just set up a new College for 200 students in Guayaquil – now one of the best institutions in Ecuador – and financing it was a priority. Only a few years before GC32, Vélaz's offer brought to the fore the clash between the two strands of the Jesuit educational apostolate, one well-established, the second an irritating newcomer. The Provincial – who was also the Rector of the new College – supposedly told Vélaz that he should expect '*ni un padre, ni un sucre*' – not a priest and not a cent. Vélaz famously declared: 'I am not asking for a priest or a cent – just let us start.'⁵⁶

⁵⁴ *Faith-based Schools*, p. 6.

⁵⁵ *Faith-based schools*, p. 4.

* *Const.* 455.

⁵⁶ Lazcano, *Vélaz*, p. 43.

The initial response of the Ecuadorian Province has marked its relationship with FyA Ecuador ever since. The phrase *ni un padre, ni un sucre* is quoted regularly by those connected with FyA to explain the continuing distrust between the two organizations. Vélaz, as warned, received no support and later complained that, even after setting up ten schools in Ecuador, he had not been able to go beyond ‘the stage of bare permissive tolerance’⁵⁷ from the Province. His insistence, here as elsewhere, that the Canonical Superior should appoint the Director and Deputy Director of FyA and name three of the nine members of the Board, seems to have made little difference.

Lazcano notes:

It seems that the Ecuadorian Jesuit Province did not, in the first years, feel responsible for Fe y Alegría. An expression of this is that the Survey S.J. for Ecuador (an evaluation requested throughout the Society by P. Arrupe) makes no reference to Fe y Alegría. It seems they considered Fe y Alegría to be alien to the Province.⁵⁸

This may have been partly due to the small number of students enrolled, most of whom were part-time and in non-formal education. But GC 32 and its emphasis on justice signalled a change. By 1980, the nine members of the FyA’s Executive Board were all Jesuit, five of them working in the Movement. This, however, is no longer the case. The first lay Director – an ex-Jesuit – has been in post since 2008. FyA is part of the family of organizations under the umbrella of the Society of Jesus. But regardless of any rhetoric, networks and the efforts of a few individuals on the ground, in practice FyA Ecuador continues to operate separately. In informal conversations with Ecuadorian Jesuits the concept of ‘parallel’ is a recurring theme: the general feeling is that the Society and FyA work ‘in parallel’: in the same direction but not together. Pedagogical initiatives for Jesuit private colleges nationally eventually trickle down to FyA. But this does not seem to be a priority: the relevant training is completed first in the private

⁵⁷ Lazcano, *Vélaz*, p. 43.

⁵⁸ Lazcano, *Vélaz*, p. 43.

colleges.⁵⁹ At local level past history means that in Chimborazo, a degree of distrust, even hostility sometimes, is still manifest on both sides.

3.2.3 Twenty-first century challenges

As well as reviewing its history, FyA Ecuador's fiftieth anniversary was also an opportunity to evaluate changed contexts and re-articulate its vision for the future, and this both for *educación popular* in general and FyA in particular. One major change identified, in Ecuador and elsewhere, was the very significant involvement of the state at every level in tackling poverty and improving wellbeing. Rafael Correa's government (2007-17) focussed a great deal of attention on education as a part of a drive for social justice and human rights. This was part of the Citizens' Revolution, his socialist programme of social reconstruction, as well as a response to international initiatives such as the MDGs and Education for All. The right to free education is enshrined in the 2008 Constitution. The role of NGO's in Ecuador – of which FyA is one – has changed considerably as a result. Following major development in infrastructure FyA's old ambition of 'starting where the tarmac stops' is no longer meaningful everywhere. The Citizens' Revolution and the *Buen Vivir National Plans* (2009-2013 and 2013-17) promoted support for life in all its forms, equality for all, respect for diversity, solidarity, participatory democracy and harmony with nature. Education, equality and health indicators have improved and until recently poverty was decreasing. Correa had campaigned in 2007 on the right of every child to free, secular education. In order to achieve this, he made schooling compulsory for all and significantly increased the Human Development Grant (*Bono de Desarrollo Humano*), an unconditional state benefit for poorer families first introduced in 2003 and payable to the mothers.⁶⁰ The ideal of free, secular education for all naturally raises the

⁵⁹ For example the introduction of 'multiple intelligences' in 2016 took place in the Jesuit colleges in 2016 and in FyA only afterwards.

⁶⁰ Unlike cash transfer programmes in other Latin American countries this is not conditional upon a minimum level of school attendance for these mothers' children. Nonetheless, families are encouraged to spend the grant on the children's welfare. Studies carried out on impact have been mainly short-term evaluations which showed significant improvements in school attendance and

issue of the role and future of *fiscomisionales*, state-funded faith schools such as FyA. Not only are they not secular, but they are not even free. Parents are expected to contribute towards school supplies, transport and uniforms unless a scholarship is granted on economic grounds. (In the case of the schools in the case study, 100% of the pupils receive a scholarship to cover their fees.) The government currently uses FyA to deliver courses on its behalf. As long as this is the case FyA will be safe. The question is what would happen should the state no longer need FyA?

Ecuador is also part of the global scene. It belongs to international neoliberal networks with a particular understanding of human development. Promoting Buen Vivir and the rights of nature in the 2008 Constitution did not stop it from intensifying oil extraction in the Amazon region, much against the wishes of the local population. But the world scene also sets and monitors human rights and development goals, and the government has taken an active role in promoting these goals at national level. This brings in another influence: that of the global community. FyA's documentation, both in Ecuador and as an international federation, reflects evolving global thinking on human rights, development and justice. Recent documentation includes references to Amartya Sen's understanding of wellbeing as human development. The introduction to the Forty-Fourth FIFYA Congress on 'Inclusive Education in Fe y Alegría's Mission' placed FyA's mission in the context of the 1948 Declaration of Human Rights as well as the global drive towards full educational coverage, quality education for all and inclusion of every person as 'different but endowed with the same dignity': 'Education as opposed to ignorance and lack of access to knowledge, and *buen vivir* as

cognitive and socio-emotional development as well as a decrease in child labour (See Eric V. Edmonds and Norbert Schady, 'Poverty alleviation and child labor', *American Economic Journal: Economic Policy*, 4/4 (2012), 100-124; and Christina Paxson and Norbert Schady, 'Cognitive development among young children in Ecuador: the roles of wealth, health, and parenting', *The Journal of Human Resources*, 42/1 (2007), 49-84. There is as yet little evidence on the long-term impact of the programme. On what evidence is available to date Tatiana Paredes-Torres has concluded that the short-term gains highlighted in studies taper off after five years of receiving the grant. Tatiana Paredes-Torres, 'The long-term effects of cash transfers on education and labor market outcomes', paper presented to Annual Congress of the European Economic Association (Lisbon, 2017), < <https://mpr.aub.uni-muenchen.de/88809/> > [accessed 10.12.2019].

a permanent refusal of poverty, have always been seen by FyA as the basis for bringing together the primary goods that any human being must enjoy from their conception.’⁶¹ There is a connection here not just with CST and the promotion of social justice but also, although not explicitly acknowledged, with Rawls’s theory of justice and the capability approach. P. Suñol argued that working for human rights, equity and social justice is an alternative to the divisive ideologies of the past. And it is an alternative that is acceptable to all, and which can bring together different actors for transformation.

But in order to contribute to this transformation, FyA Ecuador faces another challenge in the prevalent educational ethos which pervades any state-funded school. In one of the fiftieth anniversary presentations, Luis Túpac-Yupanqui outlined the type of human development that government policies tend to promote: ‘the profile seems to be very competitive’ and produces people that ‘do not appear to be people with a sense of solidarity.’⁶² Governments speak of human development and wellbeing, but especially in a neoliberal climate they tend to focus on human capital. The emphasis is thus on exam results, on technological proficiency, aptitude and competitiveness, even in a country where Buen Vivir would seem to demand other skills. This is in contradiction with FyA’s vision. Following this institutional soul-searching on its Fiftieth Anniversary, FyA Ecuador published in 2016 its *Horizonte Pedagógico Pastoral*,⁶³ a re-articulation of its vision and mission for the twenty-first century. The document reiterates FyA’s identity as a movement of *educación popular* and social development. It quotes as its corporate values justice (the quest for the common good), solidarity, participation, gender equality, responsibility, respect for diversity and difference, audacity and commitment and a transforming spirituality which ‘invites us to keep our feet on the ground so

⁶¹ Suñol, p. 13.

⁶² Túpac-Yupanqui, p. 124.

⁶³ *Horizonte Pedagógico-Pastoral: Fe y Alegría Ecuador* (Quito: Fe y Alegría Ecuador, 2016).

we start from the context in our search for a better world'.⁶⁴ The implementation of these values will be explored in Chapter 8. Among its challenges FyA includes incorporating formation to citizenship and social and political formation to promote social development: the twenty-first century version of *concientización*.

But FyA Ecuador also knows that it has to pursue a strategic partnership with the government if it is to continue improving lives and contributing to social transformation 'not from the centre, but from the periphery'.⁶⁵ It is aware that it now needs to re-invent itself in a changing context. But it is also determined to preserve its ethos and its drive for quality education for the marginalized, promoting transformation to a more just society.⁶⁶ It is equally determined to keep its freedom of thought and continue its prophetic denunciation of any injustice, any practice liable to undermine participation and democracy. But things are changing gradually. For example, faithful to Vélaz's demands, FyA continues to base its identity on a specifically Christian response to injustice. But can *mística* be preserved intact in this new environment? In 2011 FIFYA's international congress on spirituality admitted that state-funded schools can never have as strong a religious character as their independent counterparts.⁶⁷ State funding does change an institution. Explicit talk of Christianity is now watered down so that inclusiveness may prevail and replaced by a formation to spirituality independent of any religious tradition. FyA's work of transformation and prophetic denunciation will be tolerated as long as the government needs FyA's contribution, but it could become vulnerable to political vagaries.

⁶⁴ *Horizonte*, p. 62.

⁶⁵ Túpac-Yupanqui, p. 126

⁶⁶ Túpac-Yupanqui, p. 128

⁶⁷ This point arose from a debate on current trends in spirituality and religious education in FyA schools at the Forty-First International Conference. See *Revista Internacional de Fe y Alegría: Identidad y Espiritualidad vividas en misión*, 12 (2011). The implications of this will be explored further in Section 9.4.

For its part, the Society of Jesus has continued promoting FyA throughout the years, whether or not as a priority, as a proof of its commitment to the promotion of justice. FyA is now enthusiastically celebrated as such in the Society's documents and belongs to its educational networks. It seems to embody the integration of the education and the social apostolate recommended by GC 32. But in Ecuador, despite the glossy documentation and the networks, the private colleges are thriving but only two Jesuits are at all involved in FyA. This leads to a suspicion that the division between elites and masses – with, in practice, a partiality for the elite – is still extant in the Ecuadorian Province. From the viewpoint of FyA itself the dilemma may be a different one. The organization will inevitably value the autonomy that limited Jesuit involvement affords. On the other hand, it also needs to be able to avail itself of what Vélaz called 'the networks and opportunities' that the Society offers. It is a moot point, for example, whether the 2014 agreement with the government would have been reached without the proactive involvement of the Society. In Ecuador at least, the original ambivalence still subsists on both sides.

3.3 Focus on the praxis: towards a methodology

The history of the foundation of FyA and its establishment in Ecuador highlight the practical complexities and challenges of the promotion of justice demanded by faith in all its intricacies. Yet if the social apostolate and the education apostolate are to be integrated anywhere, it must surely be in the education and integral development of poor, indigenous children in isolated rural areas.

It is this conviction that determined the choice of context for the thesis. The exploration and evaluation of CSPraxis here will be based on the case study of three small rural FyA schools catering for the education of indigenous children marginalized on three accounts: their geographical isolation, their economic deprivation and their socio-ethnic background. These children are as vulnerable as they could possibly be outside a war zone. They are the 'frontier' and their education is crucial. Here the social and education apostolates are two facets of the

same action for love and justice. This makes Ignatian *educación popular* in that region hugely important and as a result, its evaluation is a necessity if the education provided is to maintain its quality and effectiveness.

This project requires a methodology that generates a sound understanding of the context, takes account of individual as well as collective development, encourages theological reflection and can at the same time accommodate the production of qualitative and, if possible, quantitative data. In addition to socio-historical analysis and theological reflection, it will be argued that a capability-based model of evaluation can provide a valuable tool to assess the impact of the organizations on the whole spectrum of the students' development, including collective and transcendental capabilities.

Let us return to Decree Four. Recognizing that Jesuits can be 'insulated' from certain realities, the decree made practical suggestions as to insertion or 'involvement with the world', crucial to developing personal and experiential knowledge. It advocated 'the most rigorous possible political and social analysis'⁶⁸ together with pastoral and apostolic discernment of the situation as a spur to new ways of thinking and doing: 'From analysis and discernment will come committed action; from the experience of action will come insight into how to proceed further.'⁶⁹

This connection between analysis/discernment and action is precisely what has made the pastoral circle in four steps invaluable for social analysis, theological reflection and discernment for practical action. The pastoral circle is related to the 'See, Judge, Act' method used in the pastoral cycle. It was proposed by Paulo Freire as a 'circle of praxis' to raise learners' awareness of their reality. It was further developed by Juan Luis Segundo in the concept of hermeneutical circles in *The Liberation of Theology*. In turn Joe Holland and Peter Henriot have used the

⁶⁸ GC 32, D.4, n. 44. The question of the compatibility of Marxist social analysis with Christianity, and the possibility of using Marxist methods of social analysis whilst rejecting the philosophy, were explicitly rejected by Arrupe in his 1980 Letter to American Provincials. See Calvez, *Foi et justice*, pp. 166-67.

⁶⁹ GC 32, D. 4, n. 44.

pastoral circle as the foundation for their approach to social analysis in the context of faith and justice.⁷⁰ Their approach consists of four stages. The first task –the ‘insertion’ stage – must be to become acquainted with the reality in all its complexity. Then comes the second stage: ‘social analysis’.⁷¹ This has to be historical, structural (relating to social structures and institutions), value-laden (option for the poor), non-dogmatic (drawing on different theoretical approaches) and last but not least, action-oriented.

The authors then turn to theological reflection on social analysis based on revelation and underpinned by CST. In their presentation of the method this comes as a third step. The authors are at pains to emphasize, however, that social analysis and theological reflection are actually not separate stages. They are interdependent, with the latter growing out of the former. Reflection will inevitably be moulded by the values and spirituality of the actors, for example the philosophy of an organization or the charism of a religious order. For Holland and Henriot this constant interaction, this perpetual back and forth movement between analysis/discernment and action is precisely what differentiates their approach from a purely academic one. The whole purpose of the exercise is to ‘[discern] the situation for the purpose of action ... it is analysis in the service of action for justice. It is an integral part of “the faith that does justice.”’⁷² The final stage of the process is pastoral planning and action followed by evaluation. The cycle is then repeated again.

The pastoral circle has proved itself to be extremely adaptable. It is admirably suited not just to the needs of practitioners in the field, but also those of researchers into their praxis. Nonetheless, like any other method it has its limitations. As the

⁷⁰ Joe Holland and Peter Henriot, SJ, *Social Analysis: Linking Faith and Justice* (revised and enlarged edition, Maryknoll, NY: Orbis Books in collaboration with the Center of Concern, 1983). The pastoral circle was developed for the Center of Concern, a think-tank co-founded by Pedro Arrupe and Joseph Bernardin in 1971 as a response to *Justice in the World*.

⁷¹ Holland and Henriot define social analysis as ‘the effort to obtain a more complete picture of a social situation by exploring its *historical and structural relationships*. Social analysis serves as a tool that permits us to grasp the reality with which we are dealing.’ Holland and Henriot, p. 14 (italics in the original).

⁷² Holland and Henriot, p. 7.

authors themselves readily admit, the pastoral circle is ‘to social strategy what diagnosis is to treatment.’⁷³ It is inherently value-laden, thus cannot claim to provide an objective view of reality. Nor does it offer solutions or even a blueprint for action or indeed, any tools for evaluation. But for Holland and Henriot, the combination of social analysis and theological reflection represents the justice-faith combination recommended by Decree Four ‘and how it applies to integral human development as understood by the Church’.⁷⁴ As such it also provides the ideal methodological tool to approach this study of education at the frontier, analyse the reasons why certain decisions were taken and evaluate the outcomes. However, the additional use of a quantitative tool would, in the authors’ words, sharpen the ‘diagnosis’ and potentially help any organization formulate adequate treatment.

According to the pastoral circle methodology, the first task will have to be a thorough historical, cultural and socio-economic context analysis, including the nature and extent of the Society’s involvement in that region. This will need to take account of the evolving social, economic and political landscape and its relationship with pedagogy and education policies. It will give a better understanding of the challenges faced by *educación popular* in isolated rural areas. It will provide the basis as to the main problems faced, the solutions adopted, and the impact of Ignatian *educación popular* on children and their communities in areas of rural deprivation. It will also illustrate how the balance between the social apostolate and the education apostolate can be negotiated as part of a mission of evangelization.

One issue still to be resolved is the search for a suitable tool to allow for quantitative measurement if possible. Currently, little is available in education beyond academic achievement indicators and these are not always available for public scrutiny. But education, and in particular Christian education, is more than academic achievement. It is this researcher’s belief that the CA would provide a suitable measurement tool. In the last fifteen years studies have been carried out to measure the impact of NGOs in developing children’s skills and capabilities, as

⁷³ Holland and Henriot, p. 15.

⁷⁴ Holland and Henriot, p. 8.

perceived by the children themselves. They have focussed on basic necessities and other dimensions of individual well-being and psychological development, although not so far on issues of collective capabilities, let alone spiritual development. These aspects themselves are of course not measurable. However, there seems to be no reason why the same tools used in those studies should not be used to measure also an organization's impact in developing children's collective capabilities and spiritual development, as perceived by the children themselves and their parents. This results in a double set of data, both qualitative and quantitative. It makes the evaluation more reliable and can provide where relevant a more dependable basis for decision-making.

3.4 Conclusion

For Vélaz, the founding of FyA represented first a work of justice according the Formula of the Institute and later, an application of Decree 4. For him educational justice was a pre-requisite of structural justice. He battled with a hierarchy by whom he felt unsupported, with theological developments he disliked, with political ideologies he could not accept. His insistence as to the identity and mission of FyA was twofold: a commitment to the poor and a Christian response to injustice. FyA has explicitly maintained these values, although its understanding of inclusiveness is evolving. It still aims to provide integral human development and has maintained its values of justice as the quest for the common good, solidarity, democratic participation and a transforming spirituality.

But for many years Vélaz believed that the Society failed to integrate the social and the education apostolates, at least in Latin America. Sixty years later, two issues still remain. Vélaz believed that the Society's continuing determination to serve the elite to the detriment of the masses was misguided. This dichotomy has not really disappeared in Ecuador. Secondly, Vélaz was concerned about the implementation of Decree Four in education for social transformation. Has educational justice, as a basis for structural justice, been achieved – by the state, by FyA, by the Society? Is it contributing to integral development and social transformation as part of evangelization? And how is this to be measured? The answers to these questions

would make it possible to appreciate the implementation of Decree Four in education in the region, and we shall return to them in Chapter 8. If we are to obtain full answers, however, a practical question needs to be addressed: can we actually translate the human development impact of education into quantitative data? Indeed, why is this important? This is what the next two chapters will be addressing.

Part II

Chapter 4. Visions of justice and human development

Theory and praxis

*The Church ... calls for a synthesis between the responsible use of methods proper to the empirical sciences and other areas of knowledge such as philosophy, theology, as well as faith itself.*¹

The concern for social justice which has been growing and maturing since *Rerum Novarum* is the result of mounting moral indignation in the face of the grinding poverty and inhuman conditions endured by a multitude of people as a result of unjust structures. The thinking of the Church, and that of the Society of Jesus, on this subject have evolved alongside other secular theories of justice and development. In this respect the Second Vatican Council made explicit the Church's commitment to 'scrutinizing the signs of the time and ... interpreting them in the light of the Gospel.'² This exercise of reflection and discernment makes it possible to uncover new insights that highlight yet unexplored facets of both justice and human development. Whilst the Christian understanding of justice and integral human development remains rooted in an unchanging ideal principle of justice and a vision of the human person as *imago dei*, it can thus continue to be enriched and developed. The question then arises as to how these new elements can then be used to improve and support praxis.

In response to a long tradition of utilitarianism the second half of the twentieth century saw the formulation of two secular philosophies of justice which have had a profound impact on approaches to human development: John Rawls's theory of justice and Amartya Sen's Capability Approach (CA). The aim of this chapter is to determine what approach and attendant metric would provide the best model to evaluate a CSPraxis initiative. In order to do so, this chapter explores the CA and its debt to John Rawls, then considers and critiques an example of utilitarian approach: two Ecuadorian studies of 'the good life' which provide interesting

¹ EG 242.

² GS 4.

quantitative data yet are silent on social inequalities and lacks of freedom. For their part critics of the CA, and Catholic critics in particular, focus on its individualism and atomism and suggest the need for an ethical underpinning of shared responsibility. Can there then be such a thing as a complete system of justice? On the basis alone of the criteria suggested by Ingrid Robeyns the CA does not fully qualify as such, whereas CST apparently can. Yet CST does not specifically address justice for children. CSPraxis, however, does so. It thus represents a comprehensive approach to justice based on clear principles guiding practical implementation in work with children.

As regards the choice of metric to assess and measure impact, the drawbacks of a utilitarian approach mean that capabilities and/or functionings offer the most comprehensive basis for evaluation. The CA has many points of convergence with CST. On the basis of studies with children to date, it is also flexible enough to constitute a valuable tool for measuring the impact of CSPraxis initiatives, and this across the whole range of human potentialities suggested by *PP*.

4.1 The background: Rawls's *Theory of Justice*

Rejecting moral intuitionism³ and the sole utilitarian principle of maximizing utility, Rawls believes in the existence of a 'correct regulative principle for anything [that] depends on the nature of that thing.'⁴ As regards justice, he argues that principles of justice can be derived rationally from a definition of a society that is fair for the most disadvantaged. The starting point of his *Theory of Justice* is thus a thought experiment which he calls the 'original position'. We are to imagine a group of persons who are asked to define what features and what political and economic structures would be relevant to create a just society which they would then occupy. In order to achieve genuine justice, members of the group must deliberate behind a 'veil of ignorance': they know nothing of the attributes

³ 'No doubt, any conception of justice will have to rely on intuition to some degree. Nevertheless, we should do what we can to reduce the direct appeal to our considered judgments. [...] An intuitionist conception of justice is, one might say, only half a conception.' John Rawls, *A Theory of Justice*, (Oxford: Oxford University Press, 1977), p. 36-37.

⁴ Rawls, *A Theory of Justice*, p. 29.

(ethnicity, gender, social position, intelligence etc.) they will have in that society. All they know is that they will possess the basic capacities to participate fully in a system of mutual cooperation. Rawls specifies two such capacities. The first is the capacity to form, pursue and revise a conception of the good, or life plan, the particular features of such 'good' being as yet unknown. The second capacity is the ability to develop a sense of justice and abide by it. Exercising these capacities, the group can then deliberate and design a social structure in which each one will seek to obtain maximum advantage. Rawls contends that from such a position discriminatory criteria would not be proposed, since no-one knows whether they might not be a member of a group likely to suffer discrimination. The conclusions would thus be considered fair by anyone. For Rawls, justice as fairness provides the moral standpoint which should underpin deliberations about social justice.

From these premises Rawls derives two principles: the Liberty Principle and an Equality Principle in two parts. The Liberty Principle defines equal basic liberties for all: freedom of conscience, freedom of association and expression, civil and political rights, opportunities and a right to wealth and personal property. It states that 'each person is to have an equal right to the most extensive total system of equal basic liberties compatible with a similar system of liberty for all.'⁵ These liberties are social primary goods. The Equality Principle governs the distribution of income, responsibility and power. Its first part bears on fair equality of opportunity. The second part is the difference principle, which has proved controversial. This states that an unequal distribution of goods is acceptable as long as 'social and economic inequalities are to be arranged so that they are both (a) to the greatest benefit of the least advantaged, and (b) attached to positions and offices open to all under conditions of fair equality of opportunity.'⁶ Thus all individuals with comparable talents and motivation face roughly similar life chances, and inequalities in society are expected to work to the benefit of the least privileged. Rawls sees this principle as necessary for ensuring distributive justice and also providing each person with meaningful options for a life worth living according to

⁵ Rawls, p. 302.

⁶ Rawls, p. 302.

their talents. In this model, however, priority goes to basic liberties over equality-based demands. This ensures the application of justice as fairness.

These principles, based on a Kantian conception of human flourishing as the free development of moral agency, would apply to the basic structure of social institutions whether economic, political or judicial. But, critically, Rawls sees his principles as characteristic of a well-ordered society under favourable circumstances,⁷ leaving undetermined what would happen in the case of less than ideal circumstances.⁸

Rawls's theory and analytical tools proved hugely influential and elicited much praise but also some criticism from scholars of different political and philosophical different backgrounds. None has tried to offer a full alternative to his theory. All critiques have focussed instead on specific aspects to be developed, complemented or re-interpreted. Supporters have expanded Rawls's principles, arguing variously for the addition of a 'global resources dividend' to eradicate systemic poverty (Thomas W. Pogge)⁹ or the possibility of incorporating economic and social rights into human rights (Charles Beitz)¹⁰. Critiques, for their part, have also focussed on particular points, bearing for the most part either on Rawls's presentation of moral principles as disembodied from their social and cultural matrix (Alasdair

⁷ Rawls, p. 8.

⁸ Rawls later addressed the issue of political legitimacy in the face of intractable disagreement regarding the human good, relying on 'the ideal of public reason' or political reasoning in order to reach principles that cannot reasonably be rejected. He contends that any conception has to be in terms of reasonable comprehensive doctrines by those who subscribe to them, leading to an overlapping consensus. (*Political Liberalism*, Columbia Classics in Philosophy, New York: Columbia University Press, 1993.)

⁹ For a defence and expansion of Rawls's principles see Thomas W. Pogge, *Realizing Rawls* (New York: Cornell University Press, 1989). The subject of a global resources dividend as an answer to poverty is treated in Pogge's 'A Global Resources Dividend' in *Ethics of Consumption: The Good Life, Justice and Global Stewardship*, ed. by David A. Crocker and Toby Linden (New York: Rowman and Littlefield, 1998), pp. 501-536; and also in *World Poverty and Human Rights: Cosmopolitan Responsibilities and Reforms*, 2nd edn (Cambridge: Polity, 2008).

¹⁰ Charles R. Beitz, *The Idea of Human Rights* (Oxford: Oxford University Press, 2009). Beitz argues for anti-poverty rights, political rights and the human rights of women.

MacIntyre¹¹ and Charles Taylor¹²) or on his account of liberty (H.L.A. Hart)¹³. Amartya Sen, for his part, has repeatedly stated his admiration for and indebtedness to Rawls. He is in full agreement with the concept of justice as fairness, the objectivity of practical reason, the importance of liberty over other primary goods, and the insistence on equality in opportunities and the distribution of primary social goods. However, he is wary of Rawls's concept of what he calls 'transcendental justice': an ideal, universally applicable principle of perfect justice in contrast to relative comparisons of justice and injustice.¹⁴ His concern is that reliance on such a principle of perfect justice may lead to the task of delivering justice being handed over to 'just institutions', with no guarantee that they will be able to do so. Moreover, such a purely institutional approach is not subject to evaluation, which Sen considers a major drawback in terms of moving towards a more just society.

Sen's critique is particularly important here because of its connection with human development. In his view the way forward is not to identify the nature of 'the just', but rather to 'investigate realization-based comparisons'¹⁵ in order to see how justice can be enhanced and injustice removed, recognizing that giving all people the same tools does not in itself make the system fair. Sen's answer is thus a comparative approach to justice, based on considering individual situations and determining what measures might be taken to improve these situations. His main

¹¹ In *After Virtue: A Study in Moral Theory*, Alasdair MacIntyre rejects individualist approaches such as that of John Rawls, arguing that morals and virtues cannot be separated from the community from which they originate. He argues instead for the Aristotelian concept of small communities bound together by a shared sense of purpose. *After Virtue: A Study in Moral Theory*, 3rd edn (Notre Dame, IN: Notre Dame University Press, 1984).

¹² Charles Taylor also turns to Aristotle to support his claim that 'man is a social animal, indeed a political animal, because he is not self-sufficient alone, and in an important sense is not self-sufficient outside a polis.' (p. 190). This criticism was probably directed at Robert Nozick rather than John Rawls, since Rawls does give consideration to the social conditions which support the formation of a commitment to justice. 'Atomism' in *Philosophy and the Human Sciences: Philosophical Papers*, vol. 2 (Cambridge: Cambridge University Press, 1985).

¹³ H. L. A. Hart, 'Rawls on Liberty and its Priority' in *Reading Rawls: Critical Studies on Rawls A Theory of Justice*, ed. by Norman Daniels (Oxford: Basil Blackwell Publishing, 1975).

¹⁴ Sen, *The Idea of Justice*, (London: Penguin Books, 2010), pp. 5-6. In view of the meaning of 'transcendental' used elsewhere in this thesis to describe the capability of knowing God (see Section 1.2.3) this expression of Sen's will not be used further in the discussion in order to avoid confusion. Reference will be made instead to 'perfect justice'. For other examples of co-optation see also Section 4.6.

¹⁵ Amartya Sen, *The Idea of Justice*, pp. 6-8.

concern is not formulating a complete theory of justice but focussing on action to address injustice. Crucially, he insists on ensuring that any action taken must be evaluated so as to maximize efficacy and impact in the quest for a more just society.

4.2 Amartya Sen's Capability Approach

Amartya Sen first started developing his own perspective in the late 1970s, famously arguing that development should be measured not in economic terms but rather in terms of individual wellbeing. In this context human well-being is defined as the freedom of individuals to be and do what they have reason to value being and doing.¹⁶ These beings and doings are divided into functionings and capabilities. According to Sen's definition, 'a functioning is an achievement of a person: what he or she manages to do or be.'¹⁷ This can be, for example, learning to read, or to drive, or being healthy. Functionings reflect a person's state; it should be distinguished from the commodities which are used to achieve them.¹⁸ The combination of completed functionings constitutes well-being achievement. Capabilities are conceptualized as potentialities and depend on the opportunity and freedom to achieve valuable functionings: they are 'the various alternative functioning bundles [a person] can achieve through choice.'¹⁹ Sen's articulation of this idea has evolved over time: in *The Idea of Justice*, capabilities are largely identified with freedoms – the freedom to achieve a set of valuable functionings. Thus in terms of the CA, poverty in its multiple dimensions means deprivation in terms of freedoms to develop potentialities rather than lack of utilities or primary goods.²⁰

¹⁶ Amartya Sen, *Inequality re-examined* (Oxford, Clarendon Press, 1992), p. 57; *Commodities and Capabilities* (Oxford: Oxford University Press, 1999); and *Development as Freedom* (Oxford: Oxford University Press, 2001).

¹⁷ Sen, *Commodities*, p. 7.

¹⁸ Sen, *Commodities*, p. 7.

¹⁹ Sen, *Commodities*, p. 18.

²⁰ Ch. 4 of Sen's *Development as Freedom* (Oxford: Oxford University Press, 1999), is entitled 'Poverty as Capability Deprivation' and elaborates on the theme that 'poverty must be seen as the deprivation of basic capabilities rather than merely as lowness of incomes.' (p. 87). In the context of Ecuador this theme has been taken up by Fernando Ponce León SJ, 'La pobreza y la sociedad justa: un análisis a partir de Amartya Sen y John Rawls', *Revista Económica y Humanismo*, 66 (2012), 81-

An essential factor for expanding valuable opportunities and freedoms is agency. Agency is a function of the ‘freedom to bring about achievements one values and attempts to produce.’²¹ Agency achievement then relates to the ‘realization of goals one has reason to pursue.’²² However, agency *freedom* – the free choice of how to act at a particular juncture – is not necessarily guided by individual well-being. Sen uses the parable of the Good Samaritan as an example of agency freedom relating to a choice of action that may put the actor in danger.

Well-being, freedom and agency are thus central to the CA and, Sen argues, they are more sensitive to a diversity of needs than Rawls’s primary goods approach. Sen has always refused to propose a list of basic capabilities, arguing that such a list should be the outcome of a democratic process of public reasoned argument within a given community. By contrast Martha Nussbaum, who centres her own version of the CA on human dignity, has established a list of ten central functional capabilities relating to the real opportunities that any individual should have and that a state should provide, at least at threshold level, for all its citizens. These relate to:

- life;
- bodily health (including adequate nourishment and shelter);
- bodily integrity (security against violence, opportunity for sexual satisfaction and choice in matters of reproduction);
- sense, imagination and thought informed and cultivated by an adequate all-round education,²³ including freedom of expression and religious exercise;
- emotions; practical reason – ability to form a conception of the good and engage in practical reflection on the planning of one’s own life;
- affiliation including political and social interaction;

104. Believing that Rawls has given too little consideration to the problem of poverty, Ponce follows Sen in conceptualizing poverty as a radical deprivation of individual freedom and opportunities for human development.

²¹ Sen, *Inequality re-examined*, p. 57.

²² Sen, *Inequality re-examined*, p. 56.

²³ Nussbaum sees this as ‘including, but by no means limited to, literacy and basic mathematical and scientific training.’ (*Frontiers*, p. 78). No reference is made here as to education for values or spiritual development.

- concern for other species;
- play;
- the right to political participation and control over one's material environment (including property rights and the right to employment).²⁴

It is worth noting that some aspects of Nussbaum's list, such as engaging in reflection on the planning of one's own life and political participation, can only apply to adults endowed with agency and autonomy.

Whilst it makes no practical recommendation as to implementation the CA has given rise to a vast array of indicators to measure well-being. The most notable are the Human Development Index (HDI) and Inequality-adjusted Human Development Index (IHDI)²⁵ as well as Alkire's and Foster's multidimensional poverty index,²⁶ adopted by the UN with the HDI and IHDI as indicators for use in its yearly Human Development reports. The CA has thus influenced and continues

²⁴ Martha Nussbaum, *Frontiers of Justice* (Cambridge, MA: Harvard University Press, 2006), p. 78; and *Creating Capabilities: The Human Development Approach* (Cambridge, MA: Harvard University Press, 2011), pp. 33-34.

²⁵ The approach of the United Nations Development Programme to human development derives from the attempt by both the economist Mahbub ul Haq and Amartya Sen to move the concept of development away from that of economic growth. In this context 'human development is about giving people more freedom to live lives they value. In effect this means developing people's abilities and giving them a chance to use them. [...] Human development is, fundamentally, about more choice.' United Nations Development Programme, 'About Development Reports', *Human Development Reports*, <<https://hdr.undp.org/en/humandev/>> [accessed 17.06.2020]. As a method of measurement for Human Development Reports the Programme introduced the Human Development Index (HDI), a statistic composite index of life expectancy at birth, education and per capita income indicators which are used to rank countries into four tiers of human development. The higher the levels in these categories, the higher the HDI score. The 2010 Human Development Report introduced the Inequality-adjusted Human Development Index (IHDI) which 'combines a country's average achievements in health, education and income with how those achievements are distributed among that country's population by "discounting" each dimension's average value according to its level of inequality.' United Nations Development Programme, 'Inequality-adjusted Human Development Index (IHDI)', *Human Development Reports*, <<https://hdr.undp.org/en/content/inequality-adjusted-humand-development-index-idhi>> [accessed 17.06.2020]. According to the 2019 Human Development Report, the IHDI value for Ecuador, which ranks 85 in the list of countries, was 0.757 in 2017 and 0.758 in 2018, whilst Norway, in first place, scored 0.954 in both years (United Nations Development Programme, *Human Development Report 2019*, <<https://hdr.undp.org/sites/default/files/hdr2019.pdf>> [accessed 17.06.2020].

²⁶ The Alkire Foster method is a system of multidimensional measurement 'that can incorporate several different "dimensions" of poverty or wellbeing, according to the context, to create measures that complement income poverty indices.' Oxford Poverty and Human Development Initiative, 'Multidimensional poverty measures using the Alkire-Foster method', <<http://www.ophi.org.uk/wp-content/uploads/Multidimensional-poverty-measures-using-the-Alkire-Foster-method.pdf?18be84>> [accessed 17.06.2020].

to influence worldwide human development initiatives such as the formulation of the MDGs and more recently, the Sustainable Development Goals. Its concepts, terminology and resultant indicators have also penetrated initiatives at national level the world over. The widespread use of these indicators, together with Nussbaum's list of central capabilities, suggests that CA-derived concepts may also provide a means for evaluation for the case studies presented in Chapters 7 and 8.

4.3 A subjectivist approach to evaluating well-being

Rawls's and Sen's theories were proposed as alternatives to utilitarianism and the economic conception of welfare. At practical level, each theory implies its own metric: resources, primary goods, functionings or capabilities. The use of a particular metric highlights the features considered to be the most important to achieve justice, but it also determines what aspects may be overlooked. Reflecting on justice as well-being, Ingrid Robeyns notes that little attention has been paid, for example, to comparing functionings and capabilities with subjectivist metrics such as happiness.²⁷ A subjectivist approach offers valuable insights on particular dimensions of human development and well-being and provides useful quantitative data.²⁸ In order to determine what such an approach could bring to this study, we shall focus on two Ecuadorian studies that use happiness and time respectively as metrics to measure well-being. Both are the work of the Ecuadorian academic and politician René Ramírez and relate to national surveys. Ramírez's information in itself is helpful background for the social analysis of the case studies, and his

²⁷ Ingrid Robeyns, 'The Capability Approach' (2015), <https://www.academia.edu/13066259/The_Capaability_Approach> [accessed 27.12.2019], p. 28. Also in *Oxford Handbook of Distributive Justice*, ed. by Serena Olsaretti (Oxford: Oxford University Press, 2018), pp. 109-128. The theoretical dimensions of this issue are explored in *Capabilities and Happiness*, ed. by Luigi Bruni, Flavio Comim and Maurizio Pugno (Oxford: Oxford University Press, 2008), both approaches being presented as part of 'a single attempt at "complicating economics" and evaluating more effectively human well-being.' (p. 13).

²⁸ Subjectivist approaches have given rise to a number of quantitative studies focussing on wellbeing, with results applied to policy making. Bhutan, for example, has devised a Gross National Happiness Index, based on Alkire's methodology. See Sabina Alkire, 'The Capability Approach and Well-Being, Measurement for Public Policy', Oxford Poverty and Human Development Initiative Working Paper, 94 (2015). In Latin America, time use has also been suggested as an alternative to economic metrics of well-being by Evelyn Benvin, Elizabeth Rivera and Varinia Tromben, 'A multidimensional time use and well-being index: a proposal for Colombia, Ecuador, Mexico and Uruguay', *CEPAL Review* 118 (2016), 115-137.

approach could also potentially be a useful tool for analysing data collected during fieldwork.

The first of Ramirez's studies uses happiness within a framework of wellbeing defined in terms of opportunities and freedoms.²⁹ It is formulated against the background of *Buen Vivir* (BV) the Andean concept of the good life and an expression which, for semantic as well as political reasons, he prefers to *well-being*.³⁰ He uses questionnaires asking various sectors of the population to score numerically their level of happiness in various areas of their lives. From a statistical analysis of the results he calculates an aggregate function of happiness, 'associated with the impact of the satisfaction felt by individuals in the various areas of their lives (work, home, health, education, relationships, environment) upon overall happiness, taking into account applicable and demographic variables.'³¹ Overall satisfaction with life thus becomes the total of all separate areas. Aspects highlighted as particularly important by participants were social relationships, marital status (50% of the sample described themselves as happy with their marital status) and participation in public and political life. The fields giving less satisfaction were the environment and finance: only 7% were happy with their financial situation. Delving into the relationship between perceived poverty and happiness, Ramirez considers that his results confirm the Easterlin paradox, whereby the level of perceived happiness within a society does not actually improve in line with material conditions: 'almost 70% of Ecuadorians feel poor or very poor, yet only 19% describe themselves as unhappy or very unhappy'.³²

²⁹ René Ramírez Gallegos, *La Felicidad como Medida del Buen Vivir en Ecuador (Entre la Materialidad y la Subjetividad)* (Quito: SENPLADES, 2007), <https://www.flacsoandes.edu.ec/sites/default/files/agora/files/1264083900.paty_hojas_0.pdf> [accessed 03.09.19]. Ramirez was a Minister of State in the Correa government from 2011 to 2017 and the author of the first *National Plan for Buen Vivir*. His aim was to demonstrate the superiority of BV principles over the neoliberal understanding of human development.

³⁰ The Spanish language uses two different words to express 'being': *estar* (which refers to a state) and *ser* (which refers to the essence of being). Thus the standard translation *bienestar* does not adequately convey the full concept of wellbeing. As Sumak Kawsay the concept of life lived in harmony with one's community and Mother Nature (the Pachamama) is an important part of the Andean worldview (see Section 6.6).

³¹ Ramírez, *La Felicidad*, p. 36.

³² Alkire, p. 13.

In this connection Ramírez quotes Adrian White's 2007 world study of subjective wellbeing,³³ according to which the Andean countries – Ecuador, Peru and Bolivia – are the only ones in South America to consider themselves 'unhappy'. This Ramírez attributes to the socio-historical situation whereby, he claims, indigenous people tend to perceive themselves as unhappy. Nonetheless, he also notes that if the concept of Unsatisfied Basic Needs (UBN) is used rather than income, then happiness ratings are proportionally inverse to the number of unsatisfied basic needs. Since the highest level of UBN occurs in the Sierra, it would seem that unhappiness in this region is not a simple matter of temperament, culture or socio-historical factors but is, rather, based on actual material deprivation, the legacy of unjust colonial structures. This result should be borne in mind in connection with the context analysis of the case studies in Chapter 6.

In his second study Ramírez follows the model of time-surveys also in use in the UK and elsewhere for the measurement of well-being. He thus proposes time as the currency and analysis unit for BV.³⁴ The most important factor of the 'good life' in a society, he argues, 'is maybe how much time its population spends in good health, valuing what it wishes to do (including work), or how much time it dedicates each day to producing sociability (being with friends, family, political community), in order to reach self-knowledge, give and receive love, contemplate, produce and enjoy art.'³⁵ Against resource-based theories, BV is analysed here as the production of relational goods measured in terms of the distribution of time well lived. The opportunities to enjoy these experiences add up to the good life – but they can only be experienced when lived in interaction and reciprocity.

³³ Adrian White, 'A global projection of subjective well-being: A challenge to positive psychology', *Psych-talk* 56 (2007), 17-20.

³⁴ René Ramírez Gallegos, 'La Vida Buena como "Riqueza" de las Naciones: Hacia una Sociología del Tiempo' *Ciencias sociales* 135-6, Special Number, 237-249 (2012). A UK example of time-surveys can be found in Jonathan Gershuny, *Time-Use Surveys and the Measurement of National Well-Being*, Oxford University/ Office for National Statistics (2011), <https://www.timeuse.org/sites/ctur/files/public/ctur_report/4486/timeusesurveysandwellbein_tcm77-232153.pdf> [accessed 12.12.2019].

³⁵ Ramírez, 'La Vida Buena', p. 238. No explicit connection is made here with either other theories of human development or well-being.

From this study Ramírez draws a number of conclusions. The first concerns the exploitation of women, who work ten more unpaid hours per week than men. The second bears on the average time Ecuadorians appear to spend on ‘living well’: 14.3% of the total time available. Thirdly, the survey also shows very low participation in public or political activity: only approx. 8.8%. Further results, not unexpected maybe, indicate that those who spend more hours on unpaid work and have less time to live well are women, the illiterate, domestic workers, day labourers, the indigenous population and the self-employed. Ramírez concludes that the level of exploitation within a society ‘is not measured exclusively in terms of money, but also in terms of the time available for social and personal emancipation: in other words, for living well. Those suffering most exclusion and discrimination are those who have the least time for a full life.’³⁶

4.4 Critiques

4.4.1 Critique of subjectivist approaches

Whilst Ramírez’s study provides interesting data at national level it does not claim to throw light on social justice at local level. In this it highlights precisely the reasons for Sen’s unease regarding the use of utilities such as time or happiness. Independently of their importance as part of well-being, he considers that such utilities neglect broader freedoms, for example the right to personal liberties. He also criticises what he sees as ‘informational limitation’³⁷: an exclusive focus on one particular aspect, such as happiness, makes interpersonal comparisons of deprivation very difficult. Other objections include the fact that calculations based on happiness, for example, are deeply unfair to those who are persistently deprived. They make the disadvantages suffered by the most vulnerable appear smaller than they actually are. Sen argues that ‘the problem of comparing the well-being

³⁶ Ramírez, ‘La Vida Buena’, p. 244.

³⁷ Sen, ‘The Economics of Happiness and Capability’ in *Capability and Happiness*, ed. by Luigini Bruni, Flavio Comim and Maurizio Pugno (New York: Oxford University Press, 2008), pp. 16-27 (p. 18).

of people has to be dissociated from the insistence on sticking to the utilitarian straitjacket of comparisons of happiness or desire.³⁸ The same conclusions would also apply to the use of time spent living well. Leaving aside any philosophical objections to utilitarian approaches as such Sabina Alkire, following Sen, argues against a metric thus based on subjective and self-assessment data. Moreover happiness for example, although important, is ‘not the only thing that we have reason to value, nor the only metric for measuring other things that we value’.³⁹

The reservations expressed by Sen and Alkire highlight the limitations of Ramirez’s studies. Each of the studies above focusses on only one aspect and the information provided is thus limited. Subjectivity is another important issue. No methodology – questionnaire, experience sampling, observation, diary, statistical methods – can avoid a degree of subjectivity, either in the recording of the amount of time spent on or the satisfaction derived from any activity. Additionally, aggregate values used to calculate enjoyment of activities (here Ramírez proposes life expectancy, illness downtime, time dedicated to the production of relational goods, and years of schooling) also reflect selective elements which will vary according to the objectives of the study involved and cannot be said to represent a full account of well-being. Also, the answers given could not in any way take into account adaptive preferences –the fact that our expectations tend to adjust to circumstances, particularly to make life bearable in adverse situations.⁴⁰ Ramirez’s approach is not sensitive to such inequalities nor, as Sen would point out, does it give any account of freedoms or agency.

This has implications for the choice of metric for the FyA case study. Subjective studies do provide information such that ‘subjective data might be used alongside other information sources to provide insights on people’s

³⁸ Amartya Sen, ‘Economics of Happiness’, p. 23.

³⁹ Amartya Sen, quoted in Alkire, ‘The Capability Approach and Well-Being’, p. 9.

⁴⁰ Sen, in Alkire, ‘The Capability Approach and Well-Being’, p. 18. Sen notes in this connection that hopelessly deprived people may lack the courage to desire any radical change and often tend to adjust their desires and expectations to what little they see as feasible (pp. 18-19).

values and perceptions with respect to other dimensions of interest.⁴¹ Thus information gleaned from Ramírez's studies, although not being specific to any region, can inform the analysis of the socio-economic and historical background anywhere in Ecuador. But the limitations highlighted above are crucial considerations when choosing a method to evaluate the praxis of an initiative for integral human development. The utilitarian approach does not give account of freedom to pursue valuable opportunities or cater for adaptive preferences or cultural differences; and as such it is not sensitive to inequalities. For these reasons it would not be an appropriate metric to use for an evaluation of CSPraxis initiatives.

4.4.2 Critiques of the CA: individualism and structures of living together

In addition to the limitations highlighted above Ramírez's studies, in spite of their accent on the relational and political participation, seem to ignore the question of the common good. Both time and happiness relate ultimately to the satisfaction of the individual. The CA, however, has also been the subject of criticism on similar grounds from philosophers supporting alternative theories of justice including, as we shall see in Section 4.6, a number of Catholic development practitioners.

A major point of contention is what many commentators, including committed supporters of the CA, see as its pervasive individualism – a criticism which has been levelled at both Sen and Nussbaum. The accusation of methodological individualism, and Sen's own response to this challenge, is vividly illustrated by an exchange of views arising from an article co-written by Frances Stewart and Séverine Deneulin.⁴² In spite of their overall support for the CA as an alternative to utilitarianism, Stewart and Deneulin make a pointed critique of Sen's *Development as Freedom*. They object to his position on two points. The first is that out of a belief in

⁴¹ Alkire, 'The Capability Approach and Well-Being', p. 13.

⁴² Frances Stewart and Séverine Deneulin, 'Amartya Sen's Contribution to Development Thinking', *Comparative Studies in International Development*, 37/2 (2002).

democratic discussion and decision-making, Sen has persistently refused to specify what capabilities a person should possess. In theory public debate regarding capabilities should lead to consensus and democratic decisions. But Stewart and Deneulin argue that ‘without a democratic understanding of priorities there is very little content to Sen’s approach’.⁴³ Moreover, Sen’s understanding of democracy seems ‘an idealistic one where political power, political economy and struggle are absent.’⁴⁴ Their second objection is a charge of atomism and methodological individualism: for Sen ‘all social phenomena must be accounted for in terms of what individuals think, choose and do.’⁴⁵

Sen countered these points first by responding directly to Stewart and Deneulin,⁴⁶ then by reiterating his arguments a few years later in *The Idea of Justice*. As regards democracy, he acknowledges this as indeed ‘critically important for the development of human capabilities.’⁴⁷ All need not be lost where ideal democracy does not operate, however: ‘the perspective of capabilities can be used at different levels, and it is not an all-or-none choice.’⁴⁸ And he refutes the accusation of ‘idealism’ by pointing out the imperfections of all democracies.⁴⁹ But as regards the charge of methodological individualism, he declares himself unable to see any basis for this diagnosis. In his view, this is a ‘misconstruction’ arising from what he calls ‘an unwillingness to distinguish adequately between the individual characteristics that are used in the CA and the social influences that operates

⁴³ Stewart and Deneulin, p. 63.

⁴⁴ Stewart and Deneulin, p. 64.

⁴⁵ Stewart and Deneulin, p. 66.

⁴⁶ Amartya Sen, ‘Response to Commentaries’, *Studies in Comparative International Development*, 37/2 (2002), 76-86.

⁴⁷ Sen, ‘Response’, p. 79. Similarly Deneulin has argued elsewhere that ‘democratic processes might not be conducive to enhancing the human good. When democratic processes themselves occur within unjust structures, such as structures of inequality, the reasons that are expressed will often be the reasons advanced by the most powerful.’ *Transforming Unjust Structures: the Capability Approach*, ed. by Séverine Deneulin, Matthias Nebel and Nicholas Sagovski, Library of Ethics and Applied Philosophy, 19 (Dordrecht: Springer, 2006), p. 32.

⁴⁸ Sen, ‘Response’, p. 79.

⁴⁹ Sen, ‘Response’, pp. 79-80.

on them.’⁵⁰ Thus Stewart and Deneulin’s critique, he argues, stops much too early. The thinking, choosing and doing by individuals is only a first step: evidently,

‘we cannot end there without an appreciation of the deep and pervasive influence of society on such “thinking, choosing and doing”: no individual can think, choose, or act without being influenced in one way or another by the nature and working of the society around him or her.’⁵¹

In this connection he also considers the possibility of group capabilities. There is no particular reason to exclude these, in his view, except for the nature of the reasoning involved: ‘ultimately, it is individual valuation on which we would have to draw ... the valuation involved would tend to be based on the importance that people attach to being able to do certain things in collaboration with others.’⁵² Sen’s concern here is the danger of a ‘re-establishing of “Society” as an abstraction vis-a-vis the individual’.⁵³ This quote from Marx illustrates his fear of what he calls the ‘mechanical social aggregation that may result from trying to erase the individual from the social scene.’⁵⁴ Whereas Christian writers caution against the absence of collective capabilities and a community dimension, Sen’s own concern relates rather to the danger of ‘seeing someone merely as a member of a group’⁵⁵ – a warning with particularly relevance at the present time.

This exchange of views continued with Deneulin’s own review of *The Idea of Justice*. There, starting with an evocation of liberation theology, she clearly draws on Medellín’s notion of structural sin when, expanding on her previous work on transforming unjust structures, she expounds a reading of injustice as ‘quintessentially structural’⁵⁶. Firstly, she argues, structures are

⁵⁰ Sen, *The Idea of Justice* (London: Penguin Books, 2010), p. 245.

⁵¹ Sen, *The Idea of Justice*, p. 244.

⁵² Sen, *The Idea of Justice*, p. 245.

⁵³ Sen, *The Idea of Justice*, p. 245.

⁵⁴ Sen, *The Idea of Justice*, p. 245.

⁵⁵ Sen, *The Idea of Justice*, pp. 246-47.

⁵⁶ Séverine Deneulin, ‘The limits of Amartya Sen’s *The Idea of Justice*’, *Third World Quarterly*, 32/4 (2011), 787-797, p. 793.

the very support of individual reasoning and reasoning relies on a ‘collective framework of meanings’; secondly, the cause of injustice lies to a great extent ‘in the structures in which [individual] actions take place.’⁵⁷ She concludes that

the idea of justice must include a judgement of the nature of structures, whether they are ‘just’ or ‘good’ ... the question of ‘just institutions’ so central to Rawls’s *Theory of Justice* is thus not redundant, as Sen contends. Judgments about conditions of a good life in common and the idea of a good society thus cannot be evaded.⁵⁸

Although committed to the capability approach, Deneulin’s extensive work on the theory and praxis of development reflects the conviction that Sen’s approach needs complementing in order to be ‘still more effectively deployed in the service of human flourishing.’⁵⁹ She has arguably developed her own version of the CA. Following Ricoeur, she insists on an adequate definition of a good life, a recognition of human fallibility, and an emphasis on collective capabilities rooted in ‘structures of living together’ and socio-historical contextualization. For Ricoeur, “ethical intention” is ‘aiming at the “good life” with and for others, in just institutions.’⁶⁰ Against this, Sen’s lack of a clear vision of what would constitute a good life is, for Deneulin, a serious weakness. Justice, she argues, ‘does not consist of freedom and reasoning alone, but of “reasoning together about the good life”,’⁶¹ Another weakness of the CA, in her view, is its inability to allow for human failure—

⁵⁷ Deneulin, ‘The limits’, p. 793.

⁵⁸ Deneulin, ‘The limits’, p. 795. See also Deneulin, “‘Necessary Thickening’: Ricoeur’s Ethic of Justice as a Complement to Sen’s Capability Approach in *Transforming Unjust Structures*, pp. 27-45 (p. 33).

⁵⁹ Deneulin, Nebel and Sagovski, ‘Introduction: The Capability Approach’ in *Transforming Unjust Structures*, pp.1-16 (p. 14).

⁶⁰ Paul Ricoeur, *One Self as Another*, trans. by Kathleen Blamey (Chicago: The University of Chicago Press, 1992), p. 172. Ricoeur defines institutions as ‘the structure of *living together* as this belongs to a historical community ... a structure irreducible to interpersonal relations and yet bound up with these. [...] What fundamentally characterizes the idea of institution is the bond of common mores and not that of constraining rules. In this, we are carried back to the *ethos* from which ethics takes its name.’ (p. 194). Rather than institutions Deneulin refers to ‘structures of living together’ which emphasises the importance of the collective bonds, that provide the conditions for individuals to flourish.

⁶¹ Michael Sandal, quoted in Deneulin, ‘The Limits’, p. 295.

which Augusto Zampini, in his own commentary, simply calls ‘sin’.⁶² Thus considering Sen’s promotion of individual freedom and agency exercised through political freedom, she argues for a need to ‘thicken’ it in two ways. Firstly, we need to accept that freedom is ‘open to the possibility of evil and ... assumes the responsibility for it’⁶³: it is precisely this ‘fragility’ which creates responsibility and gives moral principles a crucial role. Secondly, we can then use as underpinning Ricoeur’s ethical vision of the good life, or “good living together”, ‘on the basis of and within socio-historical structures and socio-historical agency’,⁶⁴ the latter to be exercised through just institutions identified by *phronēsis*.

Deneulin’s case for collective capabilities and structures of living together further builds on Charles Taylor’s critique of Sen’s functionings and capabilities as ‘disembedded from the institutional context of human activity’.⁶⁵ She uses both Taylor’s concept of irreducibly social goods and Ricoeur’s structures of living together in order to stress the need to go beyond individual capabilities when conceptualizing human development and social justice. These aspects, she argues, can only flourish if underpinned by institutions and structures that guarantee capabilities, and there are two consequences of this. Firstly, structures of living together (beyond irreducibly social goods such as maintaining one’s language and culture) are an important component of development and capability expansion. They should therefore be assessed ‘not only ... because they are good for individuals, but also according to whether they promote the collective structures which help individuals to flourish.’⁶⁶ A second point

⁶² Augusto Zampini Davies, ‘Amartya Sen’s Capability Approach and Catholic Social Teaching in dialogue: an alliance for freedom and justice?’ (unpublished PhD thesis, Roehampton University, London, 2014), p. 167.

⁶³ Deneulin, ‘Necessary Thickening’, p. 40.

⁶⁴ Deneulin, ‘Necessary thickening’, p. 42.

⁶⁵ Séverine Deneulin, ‘Beyond individual freedom and agency: structures of living together in the capability approach to development’, in *The Capability Approach: Concepts, Measures and Application*, ed. by Sabina Alkyre, Flavio Comim and Mozafat Qizilbash (Cambridge: Cambridge University Press, 2008), pp. 105-124 (p. 108).

⁶⁶ Deneulin, ‘Necessary Thickening’, p. 37.

concerns agency. Deneulin argues that if we accept that the exercise of freedom and choice cannot be separated from humanity and community, then an individual's agency cannot be said to be central to addressing deprivations. We need instead to consider

socio-historical agency (what human beings can really do or be given the particular socio-historical structures in which they are living) as ultimately central to addressing these deprivations.[...] Socio-historical agency is something that belongs to a particular historical community, is the condition of existence for individual agency, and is irreducible to interpersonal relations and yet bound up with these.⁶⁷

Consequently, evaluating any contextualized development project will require an analysis of the relevant country's socio-historical agency and structures of living together. Such an analysis is not dissimilar from Sen's own concept of contextualization, but it is undoubtedly 'thickened' by Deneulin's insistence on an ethical, communitarian underpinning such as suggested by Ricoeur and Taylor. Deneulin is careful here not to introduce explicitly faith-based arguments into the debate. Yet introducing faith as the promoter of justice and the cause of action introduces a further dimension which will also be relevant for the assessment of Christian projects and their impact. This will thus be the starting point of the methodology used in the case studies. But having rejected resources as a metric, we still need to establish whether functionings and/or capabilities might make a suitable metric to evaluate CSPraxis initiatives for IHD and social transformation. Further exploration of Catholic critiques is needed before this question can be answered.

4.4.3 Catholic critiques of the CA

The work of Deneulin referred to above is, as mentioned, presented from what she may regard as a philosophical-ethical rather than a specifically religious viewpoint on human development. It is nonetheless one that

⁶⁷ Deneulin, 'Necessary Thickening', p. 37.

reflects a strong Christian substrate. Her examination of the role of religion in human development has led her to the conclusion that religion is part of what people have reason to value, thus contributing to well-being and capability expansion. She has also brought more explicitly together the CA and CST in particular in connection with *Gaudium et Spes* and Pope Benedict's encyclicals in order to critique the CA's over-individualistic stance.⁶⁸

Tantalisingly, the enquiry into *The Faith That Does Justice* by John Haughey and his colleagues was first published in 1977, just before the coming of age of the CA.⁶⁹ Catholic theologians initially showed very little interest in the new approach. However, its growing impact and its increasing application in international development initiatives have brought a change in this respect. There is now an expanding body of literature on the commonalities and differences between CST and the CA and the possibility of a dialogue between the two. Considering that Christian organizations – including the subjects of the case studies – base their praxis on Gospel justice, we need to explore further the points of convergence and divergence between them.

On purely theoretical grounds, Sen's approach to justice is not in contradiction with but is, rather, independent of any notion of religious faith. He is wary, however, of interpreting through a religious lens any initiative which he regards as merely political and social action for development.⁷⁰ More importantly, he has no confidence in a transcendental or 'spotless' justice which tends to rely overly on 'just' institutions, simply

⁶⁸ This includes 'Human Development: Benedict XVI vs. Amartya Sen', *Revista Cultura Económica*, 75-76 (2009), 112-120; 'Christianity and Development' in *Handbook of Research on Development and Religion*, ed. by Matthew Clarke (Cheltenham: Edward Elgar, 2013), 51-65; and an article with Augusto Zampini Davies: 'Theology and Development as Capability Expansion' in *HTS Teologiese Studies/Theological Studies*, Vol 72/4 (2016), where the authors argue that the human development perspective could be enriched by theological notions such as structural sin and the contribution of religious narratives to public reasoning.

⁶⁹ *The Faith that Does Justice: Examining the Christian Sources for Social Change*, ed. by John C. Haughey (Eugene, OR: Wipf and Stock, 1977).

⁷⁰ Amartya Sen, *Identity and Violence: The Illusion of Destiny* (London: Allen Lane, 2006), p 78.

because he does not believe that just institutions can of themselves produce justice. He is clear that his focus is not on providing a complete theory of justice as such, but simply on advancing justice and reducing injustice by comparing alternative proposals for action. And these, he claims, are precisely the issues that ‘a transcendental approach cannot on its own, address.’⁷¹ Moreover, perfect justice is incapable of providing tools for evaluation, an important point in connection with the case studies. Whilst this assessment is presumably aimed at Rawls’s theory rather than faith-based understandings of justice, Sen insists that his own reference point is always *nyaya* – ‘a comprehensive concept of realized justice’⁷² – and how this can best be promoted.

By contrast Sen’s Catholic critics, by definition, view justice as deriving from a transcendental principle which also conditions their view of human nature and integral development. All are firmly convinced of the potential of the CA to promote human flourishing, but they deplore the individualism which causes it to ignore issues of common good and solidarity. Apart from Deneulin, Catholic responses of note include those of Meghan Clark in her work on solidarity in Catholic Social Thought and the praxis of human rights; Lisa Sowle Cahill who approaches the issue from the viewpoint of justice for women, as does Mary Filice; and Augusto Zampini who attempts to demonstrate the ‘scientific feasibility’ of a dialogue. Their arguments are based largely on the respective philosophical and theological grounding of the CA vs CST, but their standpoint on human flourishing means they have important qualifications to suggest to the CA, which they illustrate with case studies of Catholic praxis. An exception to this school of thought is Johan Verstraeten, whose main focus is the convergence between the CA and the CST.

⁷¹ Sen, *The Idea of Justice*, p. 105.

⁷² Sen, *The Idea of Justice*, p. 20. Sen distinguishes between *niti* (rules and institutions) and *naya* (their realization).

Clark's critique of Sen is rooted in the Christian virtue of solidarity as developed by Catholic Social Thought with its roots in the concept of *imago trinitatis*, which makes the support of human rights an imperative. The two concepts reinforce each other: solidarity is a 'social virtue ... cultivated and habituated through the practice of human rights.'⁷³ Her exploration of the practicalities of integral human development in dialogue with social analysis then leads her to consider both the theory of the CA and its implementation. She follows Deneulin in arguing that, unlike proponents of CST, CA theorists still lack a substantive view of the community as capable of solidarity to achieve the common good. Bringing solidarity in conversation with justice, she further claims that unlike CST, Sen fails to recognize the perfect obligation to give "reasonable consideration" to action and intervention.'⁷⁴

Mary Filice, whose main interest lies in women's rights, tends to refer to Martha Nussbaum's version of the CA rather than to Sen's.⁷⁵ Convinced that CST, with its focus on integral human flourishing, has a theoretical and practical contribution to make to human development, she explores both approaches and argues for a dialogue whereby CST can 'protect' the CA from individualism.⁷⁶ She then presents the practical work for human flourishing of four Catholic-inspired women's organizations in the US, in order to illustrate CST 'as lived by the faithful'.⁷⁷ This includes her own women's programme, a practical illustration of how 'Catholic communitarianism can maximize the CA'.⁷⁸

⁷³ Clark, *The Vision of Catholic Social Thought*, p. 5.

⁷⁴ Clark, p. 94.

⁷⁵ Mary E. Filice, 'Catholic Social Teaching and the Capability Approach to Human Development: A Critical Analysis and Constructive Proposal' (unpublished PhD thesis, Duquesne University, 2013).

⁷⁶ Filice, p. iv.

⁷⁷ Filice, p. 197.

⁷⁸ Filice, p. 205.

Lisa Sowle Cahill and Augusto Zampini, for their part, focus on a form of dialogue whereby both approaches can learn from each other. Thus Sowle Cahill, writing about justice for women, concludes that ‘while Martha Nussbaum brings to Catholic social teaching a strong and prophetic commitment to gender equality based on genuine and respectful collaboration with poor women, Catholic social teaching could bring to Martha Nussbaum a more social view of the person as participant in the common good, and a narrative of transcendent meaning that connects with human experiences and emotions, and enhances solidarity.’⁷⁹ For his part Zampini, who firmly believes in the possibility of a dialogue ‘for justice and freedom’ between the CA and CST,⁸⁰ uses the parables of the Kingdom as a framework to put the two in conversation. He highlights ‘a surprising anthropological and socio-economic connection between the parables and the CA.’⁸¹ But like Deneulin above, he regrets Sen’s failure to allow for human fallibility – in other words, sin. This leads him to conclude on a possible mutual enrichment between CST and the CA. CST could widen its understanding of integral autonomous development by engaging with the notion of capability and using the scheme for public reasoning provided by the CA; whereas the CA could expand its vision of human freedom and its respect for what people have reason to value, including religious values.⁸²

The similarities stressed by these Catholic scholars thus include a proactive commitment to social justice and a focus on the poorest and most vulnerable in society – themes, of course, which are not restricted to CST but echo the tenets of other major religions such as Judaism and Islam. Other points of convergence include a distrust of utilitarianism and libertarianism and acceptance of freedom and relationality as the basis for a just human development. Yet another common point is the belief in self-determination

⁷⁹ Lisa Sowle Cahill, ‘Justice for women’ in *Transforming Unjust Structures: the Capability Approach*, pp. 83-104 (p. 101).

⁸⁰ Augusto Zampini Davies, ‘Amartya Sen’s Capability Approach’, p. 14.

⁸¹ Zampini, p. 183.

⁸² Zampini, p. 264.

and being agents of change, translated now as ‘agency’ and the possibility of what Zampini calls a ‘bottom up’ approach, a parallel with the liberationist concept of ‘theology from below’. Moreover, both CST and the CA have a deep sense of the inevitable incompleteness of any action for justice.

The divergences focus mainly on two aspects: anthropology, with human beings in CST being relational but also fallible – indeed, fallen; and a lack of vision of the ‘good life’ in Sen’s work in particular. The methodological individualism with which Sen is charged is contrasted with CST’s understanding of the human being as *imago Dei* and the bonds between human beings as *imago trinitatis* and perichoresis, with the ensuing moral imperative of solidarity; in other words, a deep sense of the promotion of justice as love of God and love of neighbour. From this position Catholic writers argue for an ethical definition of the ‘good’ life, a community-driven approach to human development which leads to the common good. Their verdict in this respect, as we have seen, is unanimous: Sen’s approach is essentially atomistic. While he fully appreciates the influence of the social context in developing individual values and preferences, he accepts neither the notion of collective values demanded by Deneulin, nor the moral imperative of solidarity defended by Clark, nor indeed any obligation to promote justice in the service of faith. As for the fallible side of human nature, a corollary is that freedom alone cannot guarantee that decisions will be made for the good of the individual, let alone the common good. For Zampini, from a theological viewpoint, this refusal to acknowledge sin means that there is ‘no integrated vision between reason and faith’.⁸³ From a philosophical viewpoint, Deneulin sees this failure to acknowledge human fallibility at the root of the inability fully to acknowledge structural injustice. Combined with the emphasis on individualism outlined above, she contends that this leads to a lack of due consideration of structures of living together and the common good.

⁸³ Zampini, p. 170.

Are the divergences on the theoretical plane such that the CA has little to contribute to the evaluation of CSPraxis initiatives? This is not necessarily the case. One Catholic scholar who has taken a rather different stance from the above is Johan Verstraeten.⁸⁴ Verstraeten presents Sen's *Idea of Justice* as 'an unavoidable touchstone for the adequacy of Catholic Social Thought.'⁸⁵ In this connection he is mildly critical of his colleagues above, arguing that 'some experts are inclined to overemphasize the incommensurability between Sen's presumed liberal individualism and the common good oriented communitarian justice approach in papal encyclicals.'⁸⁶ While he acknowledges the different telos of both traditions, Verstraeten chooses instead to focus on the points of convergence. Thus he does not suggest any particular aspect either party should accept from the other. He finds similarities between Sen and CST in the role of moral indignation about injustice followed by moral reasoning; the importance of hope to counter the awareness of the incompleteness of all human actions and the impossibility of ideal solutions; and a realistic anthropology ("seeking institutions that promote justice rather than institutions as themselves manifestations of justice").⁸⁷ Sen distinguishes between rational and reasonable solutions, which matches the Thomist tradition according to which 'doing good is acting according to reason.'⁸⁸ Another common point is an understanding of universal justice according to which every human being is a neighbour (Verstraeten notes that, regardless of his wariness of religion, Sen quotes both from the Hindu tradition and the Gospel in this connection, taking the Good Samaritan as an example). A final point of convergence is the universality of human rights as grounding 'our shared

⁸⁴ Johan Verstraeten, 'Catholic Social Thought and Amartya Sen on Justice' in *Economics as a Moral Science*, ed. by Peter Rona and Laszlo Zsolnai, *Virtue and Economics 1* (Springer, 2017), 215-244. Verstraeten refers to Catholic Social Thought here as 'a normative framework' completed by 'a dynamic tradition of ethical reasoning about social, political and economic issues.' (p. 215).

⁸⁵ Verstraeten, p. 216.

⁸⁶ Verstraeten, p. 216.

⁸⁷ Sen, quoted in Verstraeten, p. 215.

⁸⁸ Verstraeten, p. 218.

humanity.’⁸⁹ To these Verstraeten adds two dimensions that further bring CST and the CA together. The first is the concept of justice. Verstraeten contends that the common good can be interpreted in different ways: as the fundamental normative purpose of the state or world community; as a means to that purpose (defined in *GS* as the sum total of all those conditions of social life which enable individuals, families and organizations ‘to attain their own perfection’⁹⁰); or, as the US Bishops proposed in *Economic Justice for All* (1986), as the realization of a participative society. On freedom, quoting the exchange between Sen and Deneulin and Stewart discussed above, Verstraeten finds enough proof that Sen does *not* underestimate the social dimensions of life to reject the accusation of methodological individualism that has been levelled against him. Verstraeten concludes that ‘the creation of a society in which people can realize their potential with real freedom matches quite well Sen’s capability approach, as well as Sen’s belief in a participative society in which also the poor have a stake as participants in the reasoning about the creation of a just society.’⁹¹

Two general points can be made regarding this discussion. The first concerns the notion of agency. Whilst the notion of self-determination and responsibility for one’s development is clearly made in CST, the word *agency* does not actually appear. Yet the advocates of a dialogue between CST and the CA do tend to present ‘agency’ as a characteristic of CST with little or no comment. It appears that the vocabulary – and maybe the concepts – of secular human development may have exerted their influence on Catholic thinkers.⁹²

⁸⁹ Sen, quoted in Verstraeten, p. 220.

⁹⁰ *GS* 74.

⁹¹ Verstraeten, p. 220.

⁹² Another example of co-optation relates to the term ‘relational’ – or ‘relationality’, which Catholic writers claim as their own but which Sen uses to describe his comparative approach as opposed to a transcendental one.

Secondly, in spite of the importance all these Catholic scholars attach to religion in development and human rights, the spiritual dimension of integral development clearly outlined in *PP*, for example, is largely downplayed in their discourse. Examples do occur: the case of a rose-growing development project in Pakistan reported by Alkire is a case in point.⁹³ But this and similar examples are not cases where spirituality and its development are at the root of the project. The human capability for transcendence is a fundamental part of integral human development as understood by CST. Yet this is not an aspect which is really developed in Catholic critiques of Sen. The examples given by Catholic writers are intended to demonstrate the ethical dimension of their own approach but relatively little attempt is made to compare examples of successful praxis from *both* traditions and analyse how they are evaluated if at all.

One rare case of such comparison appears in a recent article by Deneulin on integral human development through the CA in an Argentinian urban faith community.⁹⁴ There she explores what an IHD perspective means for action from two viewpoints: Sen's CA and the life of a faith community in a marginalized *barrio*. She proposes an understanding of IHD encompassing both which she calls 'a spirituality-extended capability approach to the progress of peoples'.⁹⁵ She does not, however, propose any sort of evaluation for such an approach. Her proposal, like many of the Catholic critiques, thus remains more of an ideal than a systematic approach to practical implementation.

These critiques then provide a useful theoretical grounding but do little to guide the implementation, let alone the evaluation, of practical initiatives:

⁹³ Sabina Alkire, *Valuing Freedoms: Sen's Capability Approach and Poverty Reduction* (Oxford: Oxford University Press, 2002), p. 152. The women involved in the project chose rose-growing over a more lucrative alternative because of the possibility to use roses for religious ceremonies and the spiritual side of flowers.

⁹⁴ Séverine Deneulin, 'Integral Human Development through the Lens of Amartya Sen's Capability Approach and the Life of a Faith Community at the Latin American Urban Margins', Kellogg Institute for International Studies, Working Paper 427 (2018).

⁹⁵ Deneulin, 'Integral Human Development', p. 30.

the separation remains between ‘the just’ and the planning, realization and assessment of praxis. Sen’s approach, as noted, is incomplete as a theory of justice: he only conceives it as a tool to conceptualize well-being and progress in advancing justice. Thus the differences of opinion concerning methodological individualism and structures of living together are unlikely to be resolved. By contrast the implication of a faith-based transcendental system of justice must be that it represents a complete and therefore all-inclusive theory of justice, even if we accept that this is only a regulative ideal. On what criteria could it be said to be the case? If such a complete theory exists, what metric should it adopt? And what would be the implications for praxis?

4.5 A ‘complete’ theory of justice: criteria and metric

It is precisely in an attempt to answer these questions that Ingrid Robeyns has proposed a philosophical approach to the question of distributive justice and associated metrics derived from her own critique of the CA. Analysing the latter, she considers it a general framework with different capability theories or capability accounts, each used for a particular purpose. She concludes that consequently, the CA as it currently stands does not provide a complete theory of justice; rather, additional aspects of a theory of justice need to be added.⁹⁶

Sen himself is, of course, confident that a complete theory of justice is not necessary for realization. Indeed, there are advantages to incompleteness, not least greater flexibility in action. Nonetheless, Robeyns lists a number of issues that theories of justice do not fully address. Firstly, she says, a theory such as the CA tends to focus on the ends rather than the means of wellbeing – which rules out resources as a metric. Secondly, interpersonal differences – personal, social, environmental – entail significant differences in converting opportunities, and

⁹⁶ Robeyns, ‘The Capability Approach’, p. 5.

⁹⁶ Robeyns, ‘The Capability Approach’, p. 9.

‘theories focussing on means downplay their normative relevance’.⁹⁷ Thirdly, a list based on the minimum threshold of capability levels, such as Martha Nussbaum’s, implies that capabilities rather than resources are the relevant metric of justice. Robeyns argues, however, that it would be more relevant for the metric of justice to relate to functionings (defined as achievements) rather than capabilities (opportunities), or indeed both.

Robeyns outlines four conditions which she considers to be the basic requirements for a complete theory of justice. Firstly, a theory must lay out the basis for its principles and claims for justice. Then it must explain its position regarding the ‘distributive rule’. Thirdly, it must differentiate between individual and collective responsibility (a terminology, Robeyns notes, largely absent from the capability literature). Finally, it must specify who is responsible for securing the selected capabilities. Robeyns sees the need for a list of modules which a complete capability theory would need to comprise.

Other justice scholars such as Richard Arneson have also argued that any distributive justice theory needs a metric to identify the dimensions of a good for comparative purposes, and a distributive rule that specifies what justice requires: equality, sufficiency, a preferential option, or desert.⁹⁸ The basic presupposition of the CA concerning distributive justice is that a comparative approach involving functionings and capabilities is the best metric of justice. Some theorists, such as Peter Vallentyne, maintain that functionings should be used when considering issues of justice, but capabilities when devising policies.⁹⁹ The choice of relevant capabilities can be the outcome of democratic public deliberation (Sen), a set of criteria necessary to function as an equal citizen (Anderson),¹⁰⁰ or a set of

⁹⁸ Richard J. Arneson, ‘Two cheers for capabilities’ in *Measuring Justice: Primary Goods and Capabilities*, ed. by Harry Brighouse and Ingrid Robeyns (Cambridge: Cambridge University Press, 2010), pp. 101-127 (pp.103-104).

⁹⁹ Peter Vallentyne, ‘Debate: Capabilities versus Opportunities for Wellbeing’, *Journal of Political Philosophy* 13 (2005), 259-71.

¹⁰⁰ Elizabeth S. Anderson, ‘What is the point of equality?’, *Ethics*, 109(2) (1999), 287-337.

objectives, such as the list of central basic capabilities proposed by Nussbaum which aims to provide ‘a partial and minimal account of social justice’.¹⁰¹

It should be noted that this discussion is based on studies which all focus on adults. The lack of consideration given to children as moral agents in philosophical discourse in general and the CA in particular mirrors their ‘bare visibility’ in CST highlighted in 1.3 above. CA scholars do not explore the choice of a suitable metric in the case of children, be it capabilities, functionings, a combination, or a modified concept.¹⁰² But it is on the grounds of insufficient evidence regarding her four requirements – the basis of fundamental principles for justice, a definite position on a distributive rule, the inability to specify the line between individual and collective capabilities, and the lack of clarity on the question of who should bear the burden for realizing capabilities – that Robeyns judges the CA to be only a partial theory of justice.

No particular theory is identified by Robeyns as fulfilling all four of her criteria. But what of CST? As a theory of human development and social justice it fulfils all four of her requirements. It is grounded in a well-defined vision of the human person and the conditions necessary for integral development. This includes basic and transcendental capabilities as well as individual and social responsibilities, and a clear body of teaching on solidarity.

CST offers all of this. After Vatican II a decision was also made as to the appropriate distributive rule: the preferential option for the poor, the vulnerable, the excluded, the marginalized – a theological and practical response to massive social injustice. CST also makes clear the responsibility of individuals as well as that of the state in securing human fulfilment and ‘the development of peoples’. *Prima*

¹⁰¹ Nussbaum, *Frontiers*, p. 71. Although her list refers to universal minimum thresholds, Nussbaum nevertheless also argues for implementation at local level.

¹⁰² The traditional view of children as adults-in-the making with no autonomy, no skills to make reasoned choices or plan their own life and no agency, explains this lack of visibility. In relation to the CA this is discussed in particular in Gottfried Schweiger and Gunter Graf, *A Philosophical Examination of Social Justice and Child Poverty* (Basingstoke: Palgrave Macmillan, 2015), p. 1; and Flavio Comim, Jérôme Ballet, Mario Biggeri and Vittorio Iervese, ‘Introduction’ in *Children and the Capability Approach: Studies in Childhood and Youth*, ed. by Mario Biggeri, Jérôme Ballet and Flavio Comim (Basingstoke: Palgrave Macmillan, 2011), p. 4.

facie this seems to answer all the basic requirements for a comprehensive theory of justice as defined by Robeyns. Yet, as outlined in Section 1.9, children, and in particular poor children, are a hugely vulnerable group that have remained ‘barely visible’ in CST.

In the conclusion to her article on children in CST Regan refers to the many Church agencies working with and for the most vulnerable children. CSPraxis is based on the normative teaching of the magisterium and the commentarial work of theologians. It draws on the centuries-long tradition of religious organizations and religious orders that have worked in health, education and the service of the poor and marginalized. It thus combines solid theoretical principles to underpin its understanding of justice, including a distributive rule and the ability to distinguish between and promote individual and collective capabilities, with a wealth of practical experience accumulated by countless religious orders and faith-based organizations. The need to harvest this experience is of particular importance in the light of Regan’s assertion that injustice against children, and particularly poor children, is perhaps ‘the most serious ethical challenge facing the contemporary Church.’¹⁰³ The Universal Declaration of the Rights of the Child (1989) has marked a change in attitudes towards children. The MDGs included reducing both extreme poverty and child mortality as well as achieving universal primary education. As a result there is a small but rapidly expanding body of literature on the capability-based development of children, including the evaluation of NGOs’ impact in expanding children’s capabilities. In the CA as in CST, praxis leads the way.

4.6 Evaluating praxis: perfect justice needs ‘something else’

CSPraxis combines the ethical robustness of a theory of justice rooted in the transcendent with the ability to contextualize and the practical flexibility needed to reduce injustice. But in itself a belief in a principle rooted in the transcendent does not, of course, help with the choice of methods for implementation. CST reminds us

¹⁰³ Regan, p. 1029-30.

clearly that it is not the mission of the Church ‘to put forward a solution which has universal validity.’¹⁰⁴

For his part, Sen also accepts that the CA ‘does not lay down any blueprint for how to deal with conflicts between, say, aggregative and distributive considerations.’¹⁰⁵ But then, his focus is on ‘realization-based comparisons that focus on the advancement or retreat of justice.’¹⁰⁶ Consequently, his approach to justice – promoting human flourishing – is an eminently pragmatic one, and it is geared both to action and, crucially, to a constant critical reassessment of this action. Thus he sees the complete absence of a system for evaluation in Rawls’s approach as a serious flaw. The ‘fundamental institutionalism’ of Rawls’s position, he argues, means that the role of guaranteeing justice is left entirely to institutions. For Sen this is a ‘utopian proposal’: perfect justice needs to use something else. Sen thus favours approaches that carefully monitor the ‘social states’ emerging from action, because they are ‘critically important in assessing that we are doing the right thing, or could do better ... To ask how things are going and whether they can be improved is a constant and inescapable part of the pursuit of justice.’¹⁰⁷ In order to achieve this, he proposes what he calls a ‘relational’ framework: a comparative approach together with an agreement based on public reasoning for ranking alternatives, articulating rankings, measuring rankings and reassessing outcomes critically.¹⁰⁸

It is likely that Sen’s critique of a transcendental theory of justice here was directed to Rawls rather than to CST. But undeniably CST does not articulate a system of evaluation, of assessing the impact of development initiatives and correcting modes

¹⁰⁴ OA 4; EG 184. In the particular context of the faith that does justice, David Hollenbach warns that ‘no single method for analysing the problems of social interaction can produce a concretely normative set of conclusions about the demands of justice.’ ‘Modern Catholic Teachings Concerning Justice’, in *The Faith that does Justice: Examining the Christian Sources for Social Change*, ed. by John C. Haughey SJ (Eugene, OR: Wipf and Stock, 1977), pp. 207-231 (p. 217).

¹⁰⁵ Sen, *The Idea of Justice*, pp. 232-233.

¹⁰⁶ Sen, *The Idea of Justice*, p. 235.

¹⁰⁷ Sen, *The Idea of Justice*, p. 86.

¹⁰⁸ Mario Biggeri, Jérôme Ballet and Flavio Comim (eds.), *Children and the Capability Approach: Studies in Childhood and Youth* (Basingstoke: Palgrave Macmillan, 2011).

of operating, especially for projects aiming to fulfil more than basic needs. Its principles are guidelines for discernment and action in given contexts, but not for evaluating the success of such actions. Nor does GC 32 specify any particular method for the evaluation it recommends. And yet the praxis of justice as an absolute requirement of faith and love will need to find a way to ‘compare alternative proposals’ and assess outcomes. What Sen is in effect suggesting here, and CST knows it needs, is the opportunity to enrich a transcendental approach through the use of qualitative and/or quantitative tools making possible a comparison of alternatives and a ‘constant critical re-examination’ of action. Beyond any differences, is there any reason why a flexible, comparative CA-based approach could not be a suitable metric for CSPraxis?

4.7 A metric for Ignatian *educación popular*: the CA?

Measuring the impact of a Christian FBO in the field must entail assessing a number of aspects. Basic needs are an inescapable duty.¹⁰⁹ Education, agency and participation are an essential part of IHD. The development of all the central capabilities listed by Nussbaum (4.2) also needs assessing. Beyond these there are two more crucial categories. The first concerns collective capabilities and structures of living together as conceptualized in the social and historical context concerned. For example, in an Andean setting this would include the socio-political organization in *ayllus* (communities) and concomitant notions of solidarity, reciprocity, and respect for nature. The second category bears on the development of the ability to ‘acknowledge the highest values and God himself, their author and end’¹¹⁰ and grow in faith.

A capability-based approach has proved a highly suitable tool for evaluating the impact of education because it focusses not merely on academic outcomes, but rather on identifying and fulfilling the needs of both the children and their communities in terms of development. Capability-based studies with children have been carried out in recent years. They have ranged from assessing the impact of

¹⁰⁹ Matt. 25:35.

¹¹⁰ *PP* 21.

organizations on the well-being of children in Uganda to measuring play and imagination in Italy,¹¹¹ from investigating child poverty in Afghanistan¹¹² to assessing the well-being of children ‘in a transitional situation’ in Peru¹¹³ and the use of photography to evaluate the well-being of British children with reference to the *Every Child Matters* 2004 government document.¹¹⁴ Methods have included field observations, interviews, focus groups, questionnaires, photography and drawings. All studies except the last have made use of quantitative methods and produced valuable quantitative as well as qualitative data.

On the basis of these studies it can be concluded that a capability-based approach would indeed provide a highly valuable tool to evaluate the praxis of Ignatian-inspired *educación popular* in the remote valleys of the Ecuadorian Andes. In such a setting, the socio-historical dimensions of the communities affected by the projects would need to include the *ayllu* (kinship-based autonomous communities) and the concept of Buen Vivir/Sumak Kawsay – the ‘good life’. In addition, the study of Ignatian projects would need to take into consideration the ecclesial and pastoral structures as well as the theological background in assessing the development of spiritual and transcendental capabilities.¹¹⁵ These are not aspects that have been tackled to date by CA-inspired studies and there is thus no set template to evaluate them. But the great advantage of the CA is precisely its

¹¹¹ Tindara Addabbo and Maria Laura Di Tommaso, ‘Children’s Capabilities and Family Characteristics in Italy: Measuring Imagination and Play’ in *Children and the Capability Approach*, pp. 222-242.

¹¹² Mario Biggeri, Jean-Francois Trani and Vincenzo Mauro, ‘The Multi-dimensionality of Child Poverty: An Empirical Investigation on Children in Afghanistan’, *Social Indicators: An International and Interdisciplinary Journal for Quality-of-Life Measurement*, Springer, 112/2 (2013), 391-416.

¹¹³ With reference to children working on the streets, a ‘transitional situation’ is used to describe a situation whereby they are ‘considered to be simultaneously on the brink of ending up on the streets or remaining members of their families.’ Marisa Horna Padrón and Jérôme Ballet, ‘Child Agency and Identity: The Case of Peruvian Children in a Transitional Situation’ in *Children and the Capability Approach*, pp. 162-174 (p. 162).

¹¹⁴ Department for Education and Skills, *Every Child Matters: Change for Children*, DfES/1081/2004 (Nottingham: DfES Publications, 2004). The five areas of child well-being were to be healthy; be safe; enjoy and achieve; make a positive contribution; and achieve economic well-being.

flexibility in making possible the use of any capabilities according to the context. There is thus every reason why this should be attempted.

4.8 Conclusion

Irrespective of the current pervasiveness of neo-liberalism, the understanding of social justice in Latin America remains rooted in a Christian ethos. Underpinned by the Catholic social understanding of justice and human development, CSPraxis has played and continues to play a significant role in matters of justice and social transformation and integral human development through its pastoral and missionary initiatives. The use as a tool of a suitably adapted version of the CA seems to provide the most comprehensive option. It can include collective capabilities and the capability for the development of spirituality and faith. By doing so, it can combine the moral purpose of a transcendental theory of justice and the flexibility of a comparative approach to reducing injustice in the field. Qualitative and quantitative methods to evaluate and monitor the impact of individual projects with children have already been devised and can be adapted for use with projects involving FBO's. This can provide a sound framework for evaluating the impact of Ignatian *educación popular* initiatives for social transformation in rural parts of central Ecuador. Building a suitable methodological template for the practicalities of measuring impact will be the task of next chapter.

Chapter 5. Using the CA as an impact evaluation tool

Towards a methodology

Implementing a development initiative has to start with identifying the most vulnerable group and carrying out a thorough analysis of the nature and cause of that group's deprivations. This is equally true for practitioners in the field and scholars evaluating such initiatives. For the latter, this exercise in turn determines methodology in the field and has implications for any further work or policy recommendations. The reasons for choosing poor children as the most vulnerable group were explored in 1.9 above. The eradication of extreme poverty remains an aspiration in developing regions, and even after the MDGs the impact of poverty on children is particularly acute. Thus thinking about child development means thinking about poverty reduction – because of the numbers involved, the irreversibility of capability failure, the neglect of children's specific needs and the transmission of poverty to the next generation. Moreover, children's wellbeing also has a strong influence on future development.¹ All these factors point to children below the age of 18 as being the most vulnerable group. Regardless of philosophical or theological standpoints the imperative remains the same: children must not remain invisible, and their education is of prime importance both for themselves as individuals and for the development of their communities. CSPraxis has long experience in relieving the suffering and the 'less than human' conditions endured by children and their communities. But evaluating such work is also 'critically important in assessing whether we are doing the right thing or could do better.'²

The first case study presented in Part III involves a small FBO which does not have a regular clientele. Thus a formal survey would have been unlikely to produce reliable results. Whilst remaining within a broad capability framework to integral development, therefore, the approach in this case is entirely qualitative. It relied on a

¹ Comim, Ballet, Biggeri and Iervese, 'Introduction' in *Children and the Capability Approach: Studies in Childhood and Youth*, p. 4.

² Amartya Sen, *The Idea of Justice* (London, Penguin Books, 2009), p. 86.

variety of sources: observation and documentation, interviews with actors both past and present and participation in the daily life of the organization as a part-time volunteer. But the second case, that of FyA, was very different. FyA is a well-established, nationwide (indeed, international) network of schools with a stable population of children and parents. This made the use of a capability-based approach as an evaluation tool potentially both feasible and valuable. Such a choice, however, has a number of implications. Firstly, it implies recognizing children as moral agents and agents of change – an outlook which fits well enough with FyA’s Freirian connection, but not necessarily with the CA or indeed CST. Then it implies reflection on the theoretical and practical advantages and drawbacks of any methods or procedures when children are viewed in this light. Last, but not least, it implies reflecting on the adaptation necessary to provide a meaningful evaluation of a system of Ignatian *educación popular* in an Andean context. This chapter focusses first on the choices involved in terms of both metric and currency. It explains why, on further examination, the CA appears to be the most suitable metric; and evolving capabilities the most meaningful currency in theory, but functionings in practice. It then explores methodological approaches developed in other studies involving both small projects and large-scale international investigations. This includes methods of selecting capability domains, the constraints involved and suitable tools and procedures. Finally, it describes how the methodology was adapted and used in the FyA case study.

5.1 Methodological issues

5.1.1 Choice of metric

The metric used for evaluating the impact of a project will vary according to the aims of the study and the philosophy underpinning the organization under scrutiny. The first attribute in the case of a study involving children is that it should reflect their experience and well-being but also their aptitude for self-determination and active participation in decisions.³ The metric will need two

³ Comim, Ballet, Biggeri and Iervese, pp. 10-12. The authors consider the promotion of children’s active participation as crucial in view of its link with agency; the expansion of their capabilities is

further features in this case: it must be suitable for evaluating social justice in education, and it must be able to evaluate this within the particular framework of an Ignatian initiative.

The nature of the best template to evaluate social justice in education has been the subject of some discussion in connection with the MDGs and the UN's Education For All initiative. Governments and international agencies initially relied on measuring enrolment and gender gap figures. But these proved inadequate in terms of assessing issues of equality and social justice, or indeed guaranteeing quality education. The focus then turned to test scores. But test scores are not universally recognized as providing a true picture of learning. Other measures of educational quality and equality have involved measuring educational outcomes either against average income levels, a method which only provides results on a national scale and does not address individual issues of injustice; or against data collected in households and communities, which are not necessarily reliable. School-based indicators have also been used but again, they do not provide a full picture of inequalities.⁴ How then to measure social justice in education? A major advantage of the CA in this respect is that it focusses on ends rather than means. Rather than the Rawlsian approach advocated by a justice scholar such as Thomas Pogge, Elaine Unterhalter and Harry Brighouse favour the CA in this respect for two further reasons. Firstly, a major advantage of the CA is its 'sensitivity to inequalities and natural endowments'⁵ and its ability to acknowledge, without stigmatization, differences in interpersonal ability to convert resources. It is also sensitive to the fact that the same resources may

socially dependent within a given cultural, social and political environment. This also reflects Article 5 of *The United Nations Convention on the Rights of the Child* which states that any person or institution legally responsible for a child must 'provide, in a manner consistent with the evolving capacities of the child, appropriate direction and guidance in the exercise by the child of the rights recognized in the ... Convention.' (United Nations, 1989), <<https://www.unicef.org/child-rights-convention/convention-text>> [accessed 12.12.2019].

⁴ Full details of these approaches can be found in Elaine Unterhalter and Harry Brighouse, 'Distribution of What for Social Justice in Education?' in *Amartya Sen's Capability Approach and Social Justice in Education*, ed. by Melanie Walker and Elaine Unterhalter (Basingstoke: Palgrave Macmillan, 2009), pp. 67-86 (pp. 68-73).

⁵ Unterhalter and Brighouse, p. 75.

be adequate for one group or individual and totally inadequate for others – a fact that a resourcist approach tends to ignore. The authors use here the example of lack of water which impacts on the school attendance of adolescent girls, and the effect of rape and pregnancy on a girl’s educational opportunities.⁶ The CA can be sensitive to the fact that children with a given set of functionings or evolving capabilities are not a unified category.

Another major advantage of the CA, according to Unterhalter and Brighouse, is that it can be adapted to take into account the various values of education: its instrumental value, relating both to inputs (teacher qualifications, cultural capital etc.) and outputs (test scores, diplomas etc.), its positional value (addressing inequality of gender, class or race) and its intrinsic value, which the authors describe as agency achievement and well-being achievement. At the core of these three overlapping areas the authors place agency freedom and well-being freedom. What particular dimensions would be included in the well-being category, however, is not specified.

All the above confirms that the CA’s sensitivity to inequality and interpersonal differences makes it a tool of choice to measure the impact of an education organization such as FyA, providing it can be suitably adapted to include the necessary capabilities and functionings. The very fact that the CA is an incomplete system of justice makes it flexible. The suggestion of any dimensions to be included in the definition of well-being, be they central or collective capabilities, moral values or spiritual growth, can be made by researchers. The ultimate choice should be a matter for public debate which should, ideally, involve the children. Religious values and practice can thus be included as crucial dimensions of well-being.

This further confirms the choice of the CA as a suitable metric for an in-depth exploration of the intrinsic value of education. The selection of the relevant dimensions is a crucial. Beyond cognitive development some of the

⁶ Unterhalter and Brighouse, p.76.

studies examined below also include a quantitative assessment of psychological and moral maturing. In connection with an Ignatian-inspired education the list needs to be further expanded to include the promotion of collective dimensions, Gospel values, and spiritual and transcendental capabilities. This will then make it possible to measure the impact, both actual and perceived, of FyA in promoting this aspect of children's integral development.

5.1.2 Choice of currency

The choice of a CA-based form of evaluation, however, presents some theoretical difficulties. As we have seen, the CA initially ignored children because of their lack of autonomy and inability to make reasoned choices in connection with life plans. They have not had the time or opportunity to develop capabilities, thus capabilities have not been considered an adequate currency to conceptualize development. This being the case, is the most suitable currency in connection with children that of capabilities, functionings, or a combination of both?

On the basis of Article 5 of the *United Nations Convention on the Rights of the Child*, Gerison Lansdown has suggested as a currency the concept of evolving capabilities, which she sees as a balance between recognizing children 'as active agents in their own lives, entitled to be listened to, respected and granted increasing autonomy in the exercise of rights',⁷ but also recognizing their need for protection.⁸ For their part, Jérôme Ballet and his colleagues also note that Article 5 incorporate all three concepts of capabilities – opportunity, capacity and agency – that evolve over time.

⁷ Gerison Lansdown, 'The Evolving Capacities of the Child', in *Innocenti Insight*, (Florence: Save the Children-UNICEF, 2005), p. 3.

⁸ In this connection, John Wall stresses the interdependence between agency and vulnerability: 'All human beings from birth to death must negotiate a lifelong dynamic of agency and vulnerability in relation to one another. [...] Agency is always conditioned by vulnerability and vulnerability in turn is shaped by agency.' *Ethics in the light of childhood* (Washington DC: Georgetown University Press, 2010), pp. 39-40. Giving the example of highly vulnerable children orphaned by the AIDS epidemic, Wall argues that whereas they have been profoundly shaped by circumstances beyond their control, 'they are not thereby robbed of the capability of responding and creating meaning.' (p. 41).

Consequently they too accept evolving capabilities as a suitable currency. This means that with a degree of self-determination, a child is given the possibility of making some choices and developing the ability to evaluate these choices. Opportunity, reasoning capacity and agency will evolve over time in line with autonomy.⁹

Whilst the case for evolving capabilities as the most suitable currency in the case of children is a compelling one, it is difficult to see how this could be meaningfully implemented in the case of a study carried out at a particular point in time rather than over a prolonged period. Biggeri and Mehrotra, although subscribing to evolving capabilities as a currency, admit that in practice ‘almost all the empirical applications are restricted to the measurement of achieved functionings.’¹⁰ The same perforce also applies to the dimensions adopted in the FyA study in Chapter 8 which was carried out over a period of a few weeks and could not have assessed the evolution of capabilities.

5.1.3 Methodological considerations

The primary aim of the case studies is not to measure children’s poverty as such but rather to measure the impact of a particular organization in addressing the multiple dimensions of poverty on their development. This, however, can only be done on the basis of a sound methodology for selecting functionings or capability domains on which to ground the evaluation. Two studies have been particularly significant when exploring methodological approaches and procedures and their implications for the FyA study. The first was Mario Biggeri and Santosh Mehrotra’s study quoted above on how to

⁹ Jérôme Ballet, Mario Biggeri and Flavio Comim, ‘Children’s Agency and the Capability Approach: A Conceptual Framework’ in *Children and the Capability Approach: Studies in Childhood and Youth*, ed. by Mario Biggeri, Jérôme Ballet and Flavio Comim (Basingstoke: Palgrave Macmillan, 2011), pp. 22-45 (p. 23).

¹⁰ Mario Biggeri and Santosh Mehrotra, ‘Child Poverty as Capability Deprivation: How to Choose Domains of Child Well-being and Poverty’ in *Children and the Capability Approach: Studies in Childhood and Youth*, ed. by Mario Biggeri, Jérôme Ballet and Flavio Comim (Basingstoke: Palgrave Macmillan, 2011), pp. 46-75 (p. 54).

choose capability domains so as to understand child poverty. Focussing on the well-being of children in poverty, they insist on the multidimensionality of poverty and the need for an assessment that addresses all the factors involved. In order to do this they explore the recommended methods for selecting the most relevant domains. In this context child poverty is analysed as capability deprivation. Following Sen¹¹ they also emphasize the dependence on the assistance and action of others in creating the conditions necessary for the development of capabilities.

The second study, by Mario Biggeri and Renato Libanora, focusses on ‘tools and procedures’ for operationalisation.¹² They propose first a procedure to help conceptualize children’s capabilities, then an evaluation tool. They follow the assumption that all choices are to be rooted in public participation and debate which include the views of children. The main points of these studies are outlined below.

5.1.4 Choosing capability domains

The selection of relevant capability domains is notoriously difficult, and a number of procedures have been suggested to help with the task. Among the most influential, Robeyns’s guidelines are based on four criteria:

- explicit formulation,
- methodological justification,
- different levels of generalities (ideal/feasible domains/dimensions),
- exhaustion and non-reduction (all important capability domains should be included and no important domain can be omitted).¹³

¹¹ Amartya Sen, *The Idea of Justice* (Cambridge MA: Harvard University Press, 2009), p. 7.

¹² Mario Biggeri and Renato Libanora, ‘From Valuing to Evaluating: Tools and Procedures to Operationalize the Capability Approach’ in *Children and the Capability Approach, Studies in Childhood and Youth*, ed. by Mario Biggeri, Jérôme Ballet and Flavio Comim (Basingstoke: Palgrave Macmillan, 2011), pp. 79-601.

¹³ Robeyns, quoted in Biggeri and Mehrotra, p. 50.

In order to prepare an initial list of domains relevant for children Biggeri and Mehrotra followed an approach in three stages. The first stage was to suggest capabilities relevant to childhood well-being, the second to justify this choice and relate it to previous work on capabilities, in particular Nussbaum, Robeyns's work on gender inequality, and literature on children's issues (United Nations, ILO). The next step was to 'capture the specific capabilities relevant for children and their broader social groups.' Both these stages involved the support of a group of childhood experts of different disciplines and backgrounds. After applying the principle of exhaustion and non-reduction they drew up a preliminary list of fourteen capability domains or dimensions relevant for children. These dimensions do indeed owe much to Nussbaum and Robeyns. They consist in life and physical health; love and care; mental well-being; bodily integrity and safety; social relations; participation; ability to be educated; freedom from economic and non-economic exploitation; shelter and environment; leisure activities; respect; religion and identity; time autonomy; and mobility. The authors noted, especially following discussion with children, that the relative importance of some of these capabilities changed with age and the child's maturity.¹⁴

Another influential approach to identifying domains of well-being has been proposed by Sabina Alkire. She identifies five basic, overlapping techniques often used in combination in order to facilitate the selection:

- the use of existing data or convention,
- a list based on consensus,
- participatory process,
- the researcher's assumptions based on theory or own informed experience, and
- expert analysis of empirical data on values or preferences.¹⁵

¹⁴ Biggeri and Mehrotra, p. 51.

¹⁵ Sabina Alkire, 'Choosing Domains: The Capability Approach and Multi-dimensional Poverty' in *The Many Dimensions of Poverty*, ed. by Nanak Kakwani and Jacques Silber (Basingstoke: Palgrave Macmillan, 2008), pp. 89-119 (p. 97).

Alkire, among others, is clear that there is no straightforward method for choosing domains of human well-being. Several methods can be used in combination and methodology depends to a large extent on the research objectives and practical constraints (time, feasibility and capacity among them).

All of them have drawbacks and can be unreliable, including data derived from statistics or based on survey outcomes. Consensus lists tend to be driven by adults rather than children, the participatory process ‘can be subject to distortions as well as adaptive preferences’¹⁶ on the part of children and assumptions, by definition, may at best be inaccurate. When combined, however, they provide a sound basis for selection and as such were used in the FyA study.

In addition to the method outlined above, Biggeri and Mehrotra describe another method in four steps, developed by the HDCA’s Thematic Group on Children’s Capabilities at Florence University and used by Biggeri and Renato Libanora. After letting the children conceptualize the capabilities without interference, the researchers focus on personal achieved functionings corresponding to each dimension, then on ‘community capabilities,’ in order to define the relevance of each one. Finally they let the children prioritize between the chosen dimensions.¹⁷ The list of capability domains thus produced will differ to some extent from the fourteen-point list proposed above. For example, the authors quote the case of a study in Nepal where the children changed the original dimension relating to religion in the fourteen-point list (religion and identity) to two separate dimensions: religion (spirituality) and religion and identity (tradition, culture). This process involves the use of ‘dynamic’ questionnaires and one of its advantages is that it allows the children to participate in listing dimensions that are important specifically from their point of view. Within the practical constraints this was

¹⁶ Biggeri and Mehrotra, p. 60

¹⁷ Biggeri and Mehrotra, pp. 52-53.

the method followed to select capability domains relevant to the children's experience in this study before measuring FyA's impact in those areas.

5.1.5 Constraints

Biggeri and Mehrotra analysed the five points listed by Alkire above from the point of view of larger studies aimed at measuring child well-being and analysing child poverty and development. These studies include tools developed by UNICEF for monitoring progress in relation to MDGs and World Bank multi-purpose household surveys. In connection with consensus, they have also examined the relevance of dimensions on their list to the goals of the ILO Convention on Minimum Ages and the various articles of the United Nations Convention on the Rights of the Child. This is particularly useful for researchers using an adaptation of the same list in ensuring that no major domain of child well-being has been missed.

Nonetheless, a smaller survey can still adequately rely on different types of data. This is indeed suggested by Alkire. Regarding 'existing data or convention', for example, she specifies that selection can be made 'mostly because of convenience [...] or because they are the only data available that have the required characteristics.'¹⁸ In the case of a micro-study such as the FyA impact case study this would, for example, relate to qualitative data derived from observation, interviews, contextual analysis and the researcher's 'informed experience', as well as quantitative socio-economic data such as government statistics for the part of the world concerned. Similarly, regarding assumptions – explicit or implicit – about what people have reason to value, Alkire notes that 'these are commonly the informed guesses of the researcher; they may also draw on convention, social or psychological theory, philosophy, religion and so on.'¹⁹ Thus existing data on context analysis, official statistics, the researcher's assumptions and experience, and evidence

¹⁸ Alkire, 'Choosing Dimensions', p. 97.

¹⁹ Alkire, 'Choosing Dimensions', p. 97.

regarding people's values including studies on time and happiness, will be of real value in determining dimensions and eventually measuring impact.

In the context of children's evolving capabilities Jérôme Ballet and his colleagues have outlined five considerations, both theoretical and practical, that should be taken into account here.²⁰ They include the following:

- 1) the possibility of converting functionings into capabilities depends on caregivers, thus adding a constraint;
- 2) the children's capabilities are affected not only by their own achieved functionings, but also by the entitlement of their caregivers to goods and services, for example maternal health or education: this translates into an intergenerational transfer of capabilities and functionings;
- 3) the interconnection between functionings and capabilities on the one hand, and instrumental capabilities such as health on the other: 'the interactions and synergies through the conversion factors shape capability sets and thus the well-being of a child';²¹
- 4) the authors outline the importance of the relationship between the child's age and capabilities in helping to uncover impediments to a "decent life", thus optimizing the timing of antipoverty interventions and exposing weaknesses and constraints in the formation of capabilities;
- 5) children, as social actors, have a role in constructing future conversion factors both as children and future adults.

In view of the multidimensionality of poverty, the authors insist on the need to take all these factors into account. They, too, emphasize the dependence on assistance and action of others in creating the conditions necessary for the development of capabilities – a point also emphasized by Deneulin, for example, in connection with structures of living together.²² These points will

²⁰ Ballet, Biggeri and Comim, 'Children's Agency', pp. 30-33.

²¹ Biggeri, Ballet and Comim, 'Children's Agency', p. 31.

²² Séverine Deneulin, 'Beyond Individual Freedom and Agency: Structures of Living Together in Sen's Capability Approach to Development' in *The Capability Approach: Concepts, Measures and Applications* ed. by Sabina Alkire, Flavio Comim and Mozafat Qizilbash (Cambridge, Cambridge University Press, 2008), pp. 105-124 (p. 120).

be useful considerations when analysing both the socio-economic context and the data obtained during the study. The first and second points relate to the context of inequality in the Chimborazo region. A comparison of parents and children's responses will help to throw light on this aspect. The third point, as we shall see, did not appear in the study's quantitative data which reported an unexpected amount of satisfaction with instrumental capabilities such as food, shelter, health and education (see Section 8.2.1). This is in contradiction with both observation and the statistics on the region, revealing a high level of adaptive preference. The fourth point would be of importance for any organization planning activities and developing policy. The point on children's role as social actors, listed here in fifth position, should perhaps be in the first place in view of its importance for the children concerned and their future as well as for the future of their community.

5.2 Tools and Procedures

Biggeri and Libanora's suggestions in this context are meant to be applied as part of an evaluative framework for projects in developing regions, which fits well with the overall purpose of the FyA case study. The authors contend that

the focus in project design and social evaluation (including impact assessment) should be on what the children are able to do and be; and on what they value and have reason to value (Sen, 1999). This involves "removing obstacles in their lives so that they have more freedom to live the kind of life which, *upon reflection*, they find valuable".²³

The corollary is that an evaluation exercise bears on two points: a project's 'capacity to provide subjective perceptions on changes and [...] the constructive role of the beneficiaries in enlarging their capabilities.'²⁴ In other words, the success of an FBO such as FyA is twofold: what it achieves in terms of capability expansion, and to what extent the 'beneficiaries' – children and/or their parents – perceive it as actually removing obstacles in their lives and feel empowered to participate in the process.

²³ Robeyns, quoted in Biggeri and Libanora, pp. 80-81 (italics in the original).

²⁴ Biggeri and Libanora, p. 81.

This means that the procedure involves two different exercises: in the first the children conceptualize their own capabilities and assess their own functionings; in the second, they determine the impact of the organization's activities. This also applies to the parents' participation.

The list suggested by Biggeri and Libanora uses a set of dimensions that had received consensus from organizations such the United Nations (Convention on the Rights of the Child) and the ILO. It incorporates Robeyns and Alkire's recommendations into their chosen method for selecting dimensions. As noted above it consists mainly of central capabilities such as those suggested by Nussbaum and Robeyns. The authors acknowledge, however, that children have not been consulted in drawing it up and that the list 'lacked root at local level.'²⁵

The process proposed by Biggeri and Libanora consists in four stages as highlighted above in connection with the HDCA group with children. With the suggested list as a starting point it invites children to think and reflect on and to participate in dimensions of well-being relevant to them. This is achieved by means of what the authors call a 'flexible', 'dynamic questionnaire', providing 'the opportunity for the children to choose the relevant dimensions on which the questionnaire is built.'²⁶ Whilst well aware of the possible bias inherent in questionnaires, the authors argue that these can still be effective if the design leads children through different steps of cognitive, subjective and collective analysis. The information is then aggregated. The design suggested is as follows.

- 1) The first step consists in letting the children conceptualize capabilities without interference, using questions such as: what are the most important opportunities a child should have during his/her life? This gives possibilities of adding as-yet-undefined capabilities to the list and does not limit answers to a pre-codified list.
- 2) The second stage concentrates on functionings already achieved for each dimension of well-being.

²⁵ Biggeri and Libanora, p. 59.

²⁶ Biggeri and Libanora, p. 82.

- 3) The third phase shifts to a more general focus by asking children about the relevance of particular dimensions for children in general in order to define the relevance of each dimension for the whole group.
- 4) Finally, the children are asked to prioritize the different dimensions chosen. The information is then aggregated to reflect the group's concerns.

The questionnaires are described as 'dynamic' inasmuch as, after discussion, a dimension may be dropped or another added if the children suggest it. In larger studies it can be specified that a number of children need to suggest a particular domain for this to be included in the list. In view of the small number of children included in the FyA case study, in order to make the questionnaires 'flexible' and 'dynamic', any dimension suggested by a child was included in the list and later in the statistical analysis of data.

In spite of the dynamicity of their questionnaire, the authors acknowledge that because it bears on qualitative items, the results are perception-based statistics, which may reflect 'deformed desire' or the formation, or existence, of adaptive preferences.²⁷ This objection is of course not limited to questionnaires used with children. The data from the FyA study were triangulated not only with data from government censuses and statistics, but also with observation, interviews, informal conversations and an analysis of local documents such as the School Context Analyses produced each year by the FyA schools. This made it possible to highlight, for example, obvious cases of adaptive preferences.

The need to include a control in a study in order to be aware of any form of local bias is emphasized in the authors' recommendations. This was done in the FyA case study.

The underlying assumption regarding all tools and procedures is that the final selection of capability domains or functionings should, as recommended by Sen, represent 'the outcome of a democratic process rooted in public scrutiny and open

²⁷ Biggeri and Libanora, p. 83.

debate.²⁸ In this respect Biggeri and Libanora, reflecting on the agency of the beneficiaries of development projects, note the importance of enabling the poor to participate in decisions affecting them. Questionnaires, in this sense, are considered to be ‘a “light” participatory tool’.²⁹

The second part of the exercise, a direct continuation from the first, is to determine the organization’s impact. After selecting the relevant domains and identifying their corresponding level of functionings, the children are asked to determine the impact of the organization on each aspect selected. Finally, they identify which capabilities the organization should prioritize for intervention.

5.3 The Fe y Alegría case study: methodology

The methodology used in the FyA case study was based on these considerations and recommendations. The ‘consensus’ list drawn up by Biggeri and Libanora reflects Nussbaum’s list of central capabilities. Rooted in universal central functional capabilities this list is valuable in any context as a starting point. It cannot, however, reflect the culture, tradition and local concerns of any specific context. Moreover, its interest in religion is limited to freedom of practice. It does not include collective dimensions, the concept of a good life or moral and spiritual capability domains, which would be all-important in a Christian context. Consequently, and in view of the local socio-historical and cultural context the researcher decided to include in addition the following dimensions: respect for nature, Buen Vivir/Sumak Kawsay (a good life), solidarity, reciprocity and *convivencia*, Gospel values, freedom to practice values as well as faith, Christian leadership and spiritual development. These aspects are part of the structures of living together in the region where the study took place. They also reflect a Christian concept of integral human development as outlined in *PP* and later encyclicals, and therefore the ethos of the organization under scrutiny. These dimensions were thus included in the questionnaires used in the survey as part

²⁸ Biggeri and Libanora, p. 79.

²⁹ Biggeri and Libanora, p. 82.

of the evaluation of FyA's impact. All the aspects of the process are studied in greater detail in Section 7.1 below.

5.4 Conclusion

The use of a theory of justice other than CST as a tool to help measure the impact of CSPraxis initiatives, and in particular *educación popular* initiatives, raises a number of methodological issues. But the CA can be a suitable metric for this purpose because of its focus on ends rather than means, because of its sensitivity to individual inequalities, and because it caters for the fact that different children will convert the same resources in different ways. Studies with children suggest the notion of evolving capabilities as a suitable currency, but in practice functionings will be the currency, particularly for a short-term study. Methods used in these studies to help children select a list of capability domains corresponding to their own context were explored. The method adopted for the FyA case study was based on these. It involves as a starting point the use of a suitable 'consensus' list drawn with the participation of experts and based largely on Nussbaum's capabilities. This can then be adapted to suit the cultural context and reflect the Ignatian underpinning of the organization and its commitment to IHD.

In connection with their methodology, Biggeri and Libanora suggest that:

our methodological proposal goes in the direction of disclosing their meaning to the child beneficiaries of the initiatives, who are otherwise assumed to be lacking proper understanding of their conditions, opportunities, aspirations and means to realize them.³⁰

It is hoped that the method suitably adapted the FyA study will in some ways have contributed to this purpose for the youngsters involved. Nonetheless, the main task of helping the children realize their entitlement rests with Fe y Alegría. Evaluating to what extent it is able to do so in the particular conditions of rural Chimborazo requires an exploration of the cultural and socio-economic characteristics of the communities concerned, and the role that FBOs can play in that context.

³⁰ Biggeri and Libanora, pp. 93-94.

Part III



Figure 6.1 Mount Chimborazo (6300 m) seen from Colta

Introduction

Exploring different theories of justice gives us a different lens through which to view the many facets of integral human development and social justice. These theories are not a digression from CST, let alone ‘rival’ models. Rather, they suggest further dimensions of day-to-day lives to be explored, new tools to assess the praxis, a wider array of data to strengthen evaluation. They can support CSPraxis by highlighting particular facets of local deprivation and by focussing on local causes of injustice, inequality and lack of opportunities. In this sense they are a valuable tool to help further integral human development, in particular within the scope of the preferential option for the poor:

To the poor, missionary activity brings light and an impulse toward true development, while a new evangelization ought to create among the wealthy a realisation that the time has arrived for them to become true brothers and sisters through the conversion of all to an ‘integral development’ open to the Absolute. [...] The poor are those to whom the mission is first addressed, and their evangelization is par excellence the sign and proof of the mission of Jesus.¹

An integral development open to the Absolute is the aim of Christian praxis. The case study presented in the next chapter focusses on an FBO that has tried to implement this formidable programme as viewed and interpreted through an Ignatian lens in its work of education with the poor. Its understanding of the ‘service of men’, its sense of mission, its vision of education were conditioned by the history of the Society and its apostolates, a background which we explored in the first part of this thesis. How this vision is implemented in the particular socio-economic reality of the Andes of central Ecuador is what we shall explore now.

¹ Pope John Paul II, *Redemptoris Missio*: On the permanent validity of the Church’s missionary mandate, (Vatican: LEV, 1990), 59.

Chapter 6. The Chimborazo Province: context analysis

The first step in the pastoral cycle proposed as methodological framework (see 3.9 above) is to obtain a ‘complete picture of a social situation by exploring its historical and structural relationships’¹ as the foundation for praxis. This begins with a thick description of the context and its history as the foundation for both a deeper socio-political and cultural analysis and the theological reflection that it prompts. If a capability-based approach to human development is also to be used as a tool for evaluation, then the context analysis should lead to the drawing up of ‘a “list” of structures of living together that build up a region’s socio-historical agency to promote development, in parallel with Nussbaum’s list of valuable capabilities.’² In terms of integral human development as understood in CST, spiritual and transcendental capabilities – Maritain’s ‘ability to know God’ – must also be included.

The socio-historical background of rural Ecuador can be divided into three broad eras. The first takes us up to the 1970s, the time of the agrarian reforms. The second corresponds to the years of the reforms, which stretched from the 1970s to the late 1990s. Coinciding as it did with the emergence of liberation theology, this brief period shattered long-established social structures and had a major impact on religious identity in rural areas. The proactive role of the liberationist local Church in Chimborazo and its aftermath are explored. Finally, in contemporary Chimborazo the core structure of living together in rural areas remains the *ayllu* – or *comunidad* in Spanish. In spite of progress in health, education and political participation the overall contemporary picture in the Ecuadorian highlands is still one of enduring racial and social discrimination and dire poverty. The implications of this background for individual freedoms and capability expansion are discussed and the crucial role of education in this regard is examined.

¹ Holland and Henriot, p. 99. GC 32 speaks of need for ‘the most rigorous political and social analysis’ coupled with ‘searching discernment [...] from the pastoral and apostolic point of view.’ (D. 4, n. 44).

² Deneulin, ‘Beyond Individual Freedom and Agency’, p. 121.

6.1 The ‘colonial’ era: before the agrarian reform

At the time of the Spanish conquest the Incas had subjugated most of what is now Ecuador for only forty years.³ Yet they had successfully imposed their ways and the use of Kichwa as the official state language. There is evidence that the native language and customs of the original nations, such as the Puruháes of Chimborazo, did survive for some time but have now long been lost.⁴

The early history of the colonisation of Latin America is well-documented and its broad features are not specific to Ecuador.⁵ What followed throughout the continent

³ The highlands of present-day Ecuador were absorbed into the Inca empire through the marriage of the Inca sovereign Wayna Kapak and the Queen of the Kingdom of Quito in 1501. When Pizarro first reached it in 1533 the Inca empire covered a large portion of the West of the South American continent, including the Pacific coast, the Andean highlands and parts of Amazonia, stretching from what is now Southern Colombia to Ecuador, Peru, Bolivia and a large part of Chile. The Incas amalgamated a number of former cultures, languages and religions. They did not ban these but promoted their own religion, the cult of the Sun, and trade was carried out in the Inca language. See Michael A. Malpass, *Ancient People of the Andes* (Ithaca, NY: Cornell University Press, 2016); and Gordon F. McEwan, *The Incas: New Perspectives* (Oxford: ABC-CLIO, 2006). Charles Stanish, in ‘Regional Research on the Inca’, *Journal of Archaeological Research*, 9/3, 213-241, also provides useful references on Inca culture and history and the ethnohistory of the Andean highlands. The empire functioned most without money, relying instead of exchange of goods and services on the basis of individual and collective reciprocity. Against goods and services to the Inca rulers the population received access to land and goods as well as food and drink for feasts – all features that have survived in contemporary local culture, certainly in the Ecuadorian Andes. Taxes were paid either in the form of labour or military obligations. See Darrell E. LaLone, ‘The Inca as a Nonmarket Economy: Supply on Command versus Supply and Demand’ in *Context for Prehistoric Exchange*, ed. by Jonathon E. Ericson and Timothy K. Earle (New York: Academic Press, 1982), pp. 291-316.

⁴ The Puruhaes were agricultural communities who grew crops, raised guinea pigs and traded within the Inca empire. The sixteenth century population is estimated to have been as much as 155,000 but the introduction of unknown diseases following the Spanish conquest led to a marked decrease in numbers. After the conquest the local clergy used either Spanish or Kichwa and it is thought that the ancient Puruhá language had disappeared by the eighteenth century. The Puruhá were considered to be a rebellious people and the history of the Chimborazo province was marked by a number of indigenous rebellions. See Barry J. Lyons, *Remembering the Hacienda: Religion, Authority and Social Change in Highland Ecuador*, Joe R. and Teresa Lozano Long Series in Latin American and Latino Art and Culture (Austin: The University of Texas Press, 2006); and Linda A. Newson, *Life and Death in Early Colonial Ecuador*, The Civilization of the American Indian Series 214 (Norman, OK: University of Oklahoma Press, 1995), pp. 46-50. Twentieth century developments are mapped in *Highlands Indians and the State in Modern Ecuador*, ed. by A. Kim Clark and Marc Becker (Pittsburgh, PA: University of Pittsburgh Press, 2007).

⁵ For a general account of the conquest of Latin America see Serge Gruzinski and Carmen Bernard, *Historia del Nuevo Mundo* (Mexico DF: Fondo de Cultura Económica, 1996); and Mark Bukholder and Lyman Johnson, *Colonial Latin America*, 6th edn (Oxford: Oxford University Press, 2008). The impact of the Spanish conquest on Inca civilization in particular is surveyed by Barbara A. Somervill in *Francisco Pizarro, Conqueror of the Incas* (Minneapolis: Compass Point Books, 2005). Serge Gruzinski explores what he calls the ‘colonization of the imaginary’ in *La colonización del imaginario: sociedades indígenas y occidentalización en el México español S. XVI-XVIII* (Mexico DF: Fondo de Cultura Económica, 1991).

was the total subjugation of the local population with forced conversion to Christianity and the establishment of a system of extensive landed estates – *haciendas* or *fazendas* – where the indigenous population was virtually enslaved. In the Sierra haciendas were often run by absentee landlords with the day-to-day management of the estate falling to administrators and overseers, often mestizos, and operating on a system of *concertaje* or debt bondage. This meant indigenous families would receive a nominal wage but food, shelter and clothing would have to be bought from the landowner at such prices that indigenous families were soon left with debts they could never repay and thus tied to the land. Workers were also granted small plots of the least fertile land – known locally as *huasipungo* – which they were allowed to cultivate for their own benefit. In Ecuador independence in 1822 had no effect on the system. Even the abolition of *concertaje* in 1918 brought no change in the Sierra. The plight of indigenous populations before the agrarian reforms was a characteristic example of what *PP* would later define as ‘less than human conditions’.

As for the missions that accompanied the *conquistadores*, their role was not just to evangelize but also to ‘civilize’ the people concerned. This dual role was used by successive governments both in colonial days and after independence, with the new Republic using the missions as an instrument to ‘uproot the barbarous language and customs’ of the ‘savages’.⁶ This outlook was widely shared by the missionaries themselves who tended to believe that ‘the best act of concern and caring towards them was to do everything possible to get them out of their condition’,⁷ an interestingly contextualized version of the faith that does justice. The political and religious elements thus formed an ‘indissoluble unit’⁸ aimed at integrating the so-called ‘savages’. Missionaries were as much agents of the state as agents of evangelization, and the landowning Catholic Church was seen as an integral part of

⁶ Juan Botasso SDB, ‘Las nacionalidades indígenas, el Estado y la misiones en Ecuador, *Ecuador Debate*, 12 (1986), 151-159 (p. 154). Jesuit and Salesian missionaries were until the 1950s the main source of anthropological knowledge on indigenous nations, with indigeneity mainly seen as an obstacle to progress. In literature, the plight of the Indian population was described in painfully realistic terms by the Ecuadorian *indigenista* school, the best-known example being Jorge Icaza’s novel *Huasipungo* (1935).

⁷ Botasso, p. 155.

⁸ Botasso, p. 155.

the oppressing establishment. In 1956 Bishop Proaño of Riobamba, a committed liberationist bishop, was still writing in a pastoral letter in terms of ‘incorporating the Indians into civilized life [...] into the great project of the nation state.’⁹ It is partly for this purpose that local churches organized bilingual educational radio programmes, the ultimate aim being literacy in Spanish as a tool for social and economic integration.

The period following the Second World War saw gradual but profound change. One such change was due to the 1948 Universal Declaration of Human Rights proclaiming the innate freedom and equal dignity and rights of all human beings. Latin America had its own intellectual tradition of human rights, which indeed influenced the formulation of the 1948 Universal Declaration.¹⁰ But the Universal Declaration resulted in a growing awareness of the ‘vast contradictions between the persistent idea of human rights and the persistent violation of them’¹¹ and the need for reform became more evident. Then the 1960s the conclusions of Vatican II were closely followed by those of CELAM at Medellin. Catholic missions were encouraged to review their traditional approach to evangelization and to discern the

⁹ Bishop Leonidas Proaño, quoted in Juan Illicachi Guznay, *Diálogos del Catolicismo y Protestantismo indígena en Chimborazo* (Quito: Abya Yala/UPS, 2014), p. 100.

¹⁰ The existence of a Latin American human rights tradition and the role it played in the drawing up of the Universal Declaration of Human Rights has been documented for example in the work of Johannes Morsink, *The Universal Declaration of Human Rights: Origins, Drafting and Intent* (Philadelphia: University of Pennsylvania Press, 1999) and Mary Ann Glendon, *A World Made New: Eleanor Roosevelt and the Universal Declaration of Human Rights* (New York: Random House, 2001). These recognize the deep influence of the Latin American states but do not delve into its origins. By contrast Paolo Carozza outlines different moments in the formation of the Latin American tradition of human rights, starting with Bartolomé de las Casas and exploring the influence of the European Enlightenment and Rousseau, the French *Declaration of the Rights and Duties of Men* and the United States Constitution. He points out, however, that these were initially transmitted via Spain thus devoid of anticlericalism. This explains the influence of Catholic social teaching in Latin America ever since the publication of *Rerum Novarum* in 1891. Even in Mexico, a country where the Church was persecuted, Carozza opines that ‘the parallel between the Mexican revolution social policies and Catholic social activities highlights the continuation of one of the Latin American tradition’s central themes: seeking to combine and balance the individual and the communal aspects of human rights.’ ‘From Conquest to Constitutions: Retrieving the Latin American Tradition of the Idea of Human Rights’, *Human Rights Quarterly* 25 (2003), 281-313 (p. 311). For a consideration of the differences between the different ‘Anglo’ and ‘Latin’ legal traditions and the divisions they entail for the Inter-American Human Rights system see Paolo G. Carozza, ‘The Anglo-Latin Divide and the Future of the Inter-American System of Human Rights’, *Notre Dame Journal of International and Comparative Law*, 5/1, Art. 6 (2015), 154-170.

¹¹ Carozza, ‘From Conquest to Constitutions’, p. 313.



Figure 6.2 Valley near Ozogoche (Chimborazo).



Figure 6.3 The páramo in Sangay National Park (Chimborazo), altitude 3700 m.

‘seeds of the Word’ present in all religions.¹² Liberation theology brought with it not just a focus on the poorest but also the notion of ‘structural sin’, implying the need, the duty even, to question the structural causes of poverty and injustice and to take action, radical if need be, to address them. In order to achieve this, it was essential to make the masses aware of the root of their plight. Pioneered by Paulo Freire, an awareness-raising education was viewed as a major tool for social transformation within a liberationist approach.

6.2 The agrarian reforms and the Catholic Church

In view of the low productivity of Ecuadorian haciendas, especially in the highlands, the drive to alter the socio-economic structure first came in the late 1950s from a push for economic development. The state launched, for the first time, a programme to develop agriculture and improve conditions in indigenous communities. But impact remained limited because the programme focussed on infrastructure – education, technology, health care – rather than structural issues.¹³

The next step was to redistribute land in an effort to improve productivity and integrate rural indigenous populations into the national economy. These were the aims of the 1964 agrarian reform law, but opposition from wealthy landowners limited the scope of the reform. The maximum size of properties was reduced, but not drastically. The system of rent through labour still extant in the highlands was abolished and tenants were officially granted legal ownership of their *huasipungos*. But implementation across the country was patchy and ground to a halt when the government fell in 1966, until another military coup led to a new reform law in 1973. In many cases the redistributed land passed to cooperatives or speculators rather than individuals. Nationally, it is estimated that by 1979 only 15% of the land had been redistributed. By contrast, by that date more than half the land in the canton of Guamote, in central Chimborazo, had been redistributed. The difference between these figures is widely attributed to one main factor: the ‘progressive’ approach to

¹² Council Fathers, *Ad Gentes: On the Mission Activity of the Church* (Vatican: LEV, 1965), 11.

¹³ See Víctor Breton Solo de Zaldívar, ‘Cooperación al desarrollo, capital social y neo-indigenismo en perspectiva histórica’, *European Review of Latin American and Caribbean Studies* (2001), 61–86.

social justice of the Church in Riobamba at the time of the reforms, namely the work of Bishop Proaño in his diocese and the Jesuit mission in Guamote.

6.2.1 The Diocese of Riobamba: integral rural development and *indigenismo*

The CELAM conferences at both Medellín and Puebla focussed on ‘the poor’ generically, the indigenous dimension being subsumed in that of the rural population at large: *campesinos*.¹⁴ No such confusion was possible in the diocese of Riobamba, more or less coterminous with the Province of Chimborazo, where the vast majority of rural peasants were indigenous. Leonidas Proaño, a mestizo priest from Northern Ecuador, became Bishop of Riobamba in 1954 and remained in post until 1985. A committed supporter of liberation theology, he pursued for thirty years, in the face of much opposition, his combined action of social liberation, education and evangelization. He distributed Church land to found cooperatives, created a *Pastoral Indígena* to minister to indigenous populations with a flying missionary team covering rural areas, and encouraged the formation of indigenous catechists and clergy. In political terms, his promotion of social justice as part of Christian salvation entailed supporting political and legal rights for the Puruháes. He was clear as to the need for them to own the land necessary for their economic survival and gave them his wholehearted support, openly condemning cases of injustice or repression and even handing over diocesan land.

Proaño’s approach to indigenous emancipation was a two-pronged one: integral rural development and education. A twenty-first century critique would identify elements of paternalism and *asistencialismo* (welfarism) also found in the other development programs of the time, whether from NGOs or FBOs. The praxis of *promoción humana* was to a large extent the top-down approach of a Christian elite dispensing social justice to the masses, on the

¹⁴ The same misconception applied at state level: there were at the time no state policies specifically targeting the development of the indigenous population. Protestant missions had started projects but were criticized for trying to acculturate these populations or even interfering with the life of their communities.

model outlined by Segundo and used by Medellín (see Section 2.2.6 above). There was little congruence between the perceived need to ‘lower ourselves to the Indians’ level’ and ‘teach them to rise’, albeit for evangelization purposes, and a policy of *conscientización* supposedly based on dialogue and solidarity between equals.



Figure 6.4 Santa Maria Natividad de la Balbanera, Colta, the first church built in Ecuador (1534) near the early headquarters of the conquistadores.

In Chimborazo development meant agricultural modernisation. The early model often used by colonial powers in preparation for independence focussed on cultural integration and economic progress. Action revolved mainly around literacy and training to prepare the workforce to run a colony's industries: education for social capital. But Latin American sociologists have rejected this model on the grounds that it had little impact on socio-economic structures and was perceived as inculcating in the colonized the norms and values of the imperial system.¹⁵ The alternative favoured by Proaño was

¹⁵ See Ezequiel Ander-Egg, *Metodología y práctica del desarrollo de la comunidad*, 3 vols, Colección Política, Servicios y Trabajo Social (Buenos Aires: Lumen Humanitas, 2001–03).

integral development based on participation and community involvement. He obtained from the ILO the help of the socio-economist Rudolf Rezsóhazy. Basing his action on an assessment of local needs and demands and careful planning, Rezsóhazy encouraged the active involvement of the whole target community in decision-making and transformation.¹⁶ He trained Riobamba facilitators on cooperatives and development policies in the early 1960s according to Freire's new approach. Beyond material development he also incorporated themes of liberation, justice, participation through dialogue, spiritual as well as material alienation, and the possible role of the church in the development process.¹⁷ Vilified by the landowning class, Proaño nonetheless urged all priests to continue working for 'integral liberation' from exploitation in the diocese according to his interpretation of Gospel commandments.

6.2.2 Praxis for social justice: the Jesuit Mission in Guamote

In 1968, a few months before the Medellín conference, CELAM's Missions Department began investigating possible territories to implement the Second Vatican Council's vision for missions. Their secretary was an Ecuadorian Jesuit anthropologist with experience of mission to indigenous populations in both Mexico and the Ecuadorian highlands. The choice fell on Guamote, Chimborazo, the poorest canton in Ecuador with 95% of the population composed of destitute indigenous peasants, many of them illiterate, who had just been granted a theoretical claim to the land they worked. Guamote, it was thought, could supply a model for applying the new approach proposed by Vatican II and Medellín to other Latin American missions. It fell to this anthropologist and his younger brother, both Jesuit missionaries, to

¹⁶ Rezsóhazy defines community development as 'a coordinated and systematic action which, in response to needs or social demand, attempts to organize the overall progress of a community within a clearly defined territory or a targeted population with the participation of the interested parties', Rudolf Rezsóhazy, *El desarrollo comunitario: participar, programar, innovar* (Madrid: Narcea, 1988), p. 18.

¹⁷ The practical results were the eventual creation of cooperatives and the formation of CEAS, a centre for research and social action dedicated to micro-credit facilities and local socio-economic research.

implement it. They arrived in Guamote in December 1970 at a time of deep social and economic as well as theological change.

In his written accounts of their work P. Julio, the younger brother, outlines thus the twin objectives of the Mission: development as ‘humanisation’ and evangelization.¹⁸ In line with the vision and the terminology of *PP* and Medellín, this process of ‘humanisation’ was geared to promoting the integral development of both the indigenous and the mestizo communities and their culture in ‘an authentic evangelical incarnation’.¹⁹ P. Julio saw the dual process of evangelization and human development as based on two guiding principles: unity in the love of Christ as one people of God as the mainstay for justice and equity; and the need to ‘gladly and reverently lay bare the seeds of the Word’ hidden in other cultures.²⁰

The missionaries based their methods on what they called ‘a theo-anthropological’ approach grounded in a thorough ‘knowledge of reality’,²¹ driven both by an Ignatian approach and Medellín’s recommendations, and analysed against the revelation of the Gospel. The starting point was a review of all existing background data at both parish and regional level. From these data they sought *normicidad* – the norms and dynamics of the culture. The insertion stage then involved sharing the lives of indigenous communities and establishing a dialogue with them on equal terms, in their own language, making sure to ‘acknowledge themselves to be members of the group of men among whom they live’.²²

The next stage involved planning and implementing integral development programmes. Evangelization and *humanización* were to be achieved jointly

¹⁸ Julio Gortaire Iturralde SJ, *Testimonio*, Testimonios, 6 (Quito: Centro Ignaciano del Ecuador, 2003), p. 66; and *Guamote en camino de liberación: Historia de una Iglesia, de un Pueblo – Años: 1970–2013* (Quito: Centro Ignaciano del Ecuador, 2017).

¹⁹ Gortaire, *Testimonio*, p. 68.

²⁰ AG 11b.

²¹ Gortaire, *Testimonio*, p. 66.

²² AG 11.

by encouraging the ‘responsible and conscious participation’ of the population concerned, in order to prepare them to manage their own development.²³ Finally, the evaluation stage assessed progress and future needs, thus promoting a continuous cycle of development. The missionaries’ role thus echoed Bishop Proaño’s liberationist model for the diocese. Freire’s approach was used to teach literacy, and Julio’s account seems to stress participation and agency, both theologically and socially.

At the time, the notion of prompting Ecuadorian indigenous populations to reflect on theological matters was ground-breaking. Julio let people slowly draw their own conclusions so that they would ‘become subjects of their own development, liberation and salvation.’²⁴ He describes in very simple terms this process of *conscientización* in connection with a four-year theological and psychological reflection on the Lord’s Prayer, which he describes as a ‘revolutionary prayer’, and the awakening sense of its socio-political implications:

So, the whites are our brothers? But then, why are they exploiting us? Are we inferior? Has God made us just to serve them? They even think they are the only sons of God. We are all brothers. We have the same rights. It isn’t right for them to exploit us. We must defend ourselves.²⁵

The dual quest for social justice and evangelization was reflected in the setting up of *Acción Integral Guamote*, a social centre with catechetical training still operating today. Later came *Jatun Ayllu*, an organization regrouping all indigenous groups in the canton and promoting direct participation in local politics. *Jatun Ayllu* – or ‘extended community’ – regroups 21 out of 54 local communities that wanted to be a living church, a

²³ Gortaire himself insists on both the natural and transcendental capabilities, seeing *humanización* as providing the conditions for the integral development of the communities so the human person can be ‘more a person, more like God, like Christ, like the Virgin Mary’ (p. 72). An MA thesis focussing on Gortaire’s work in Guamote concentrates on his support for farmers fighting for their land, which it labels liberation theology (Jaime G. Sánchez Paguay, ‘Fundamentos Bíblicos-Teológicos sobre la Evangelización Inculturada en Guamote con Proyección Diocesana (1970–2010)’ (unpublished Pastoral Theology Degree thesis, Universidad Politécnica Salesiana, Quito, 2010). Gortaire himself has never used this label.

²⁴ Gortaire, *Testimonio*, p. 106.

²⁵ Gortaire, *Guamote en camino*, p. 83.

‘new creation’ transformed by the Christian message,²⁶ with its own institutions and politics. Improvements in infrastructure were funded by financial contributions from the communities themselves. Small agro-business projects were launched and eventually a cooperative bank was also set up.

But the main impact maybe was at political level. The missionaries fought passionately for indigenous rights to the land through tireless advocacy and recourse to the courts where necessary. As redistribution of the land slowly continued, local farmers learnt gradually to read and fight their own legal battles. It has been claimed that there is not an indigenous organization in the region that was not in some degree supported by the Church.²⁷ The Jesuit mission in particular is recognized as a leading force behind the rise of indigenous power locally and the foundation in 1972 of Ecuarrunari, the first Ecuadorian indigenous movement. The Catholic Church in the diocese seemed to be modelling a new understanding of indigenous identity, and Guamote became a focus for the 1973 second agrarian reform and the rise of indigenous movements.

The development of highly successful indigenous organizations is one of the salient facts of Ecuadorian politics in the 1980s, and their influence grew in the 1990s. CONAIE, the leading association,²⁸ organized in 1990 the first national popular uprising, demanding the effective processing of land claims and the establishment of a multi-nation state. This had limited success, but further uprisings succeeded in stopping the privatisation of water supplies

²⁶ Pedro Arrupe defines inculturation as ‘the incarnation of Christian life and of the Christian message in a particular context, in such a way that this experience [...] becomes a principle that animates, directs and unifies the culture, transforming and remaking it so as to bring about “a new creation.”’ ‘On Inculturation, to the Whole Society’, in *Other Apostolates Today: Selected Letters and Addresses – III*, ed. by Jérôme Aixala (St Louis: The Institute of Jesuit Sources, 1981), pp. 171–81 (p. 171). This document is never explicitly mentioned in the *Testimonio*.

²⁷ Botasso, p. 152.

²⁸ CONAIE (the Confederation of Indigenous Nationalities of Ecuador) represented then approximately 61% of the indigenous population. Its political agenda included land rights, concern for the environment, opposition to North American ‘imperialist’ expansion and neoliberal policies, and the fostering of positive identities by recognizing the value of ancestral cultures, languages and spirituality.

and the sale of communal land in 1994, and in securing an amendment to the new draft Constitution in 1998. This defined Ecuador as a multi-ethnic and multi-cultural state and guaranteed the right of indigenous people ‘to maintain, develop and strengthen their spiritual, cultural, linguistic, social, political and economic identity and traditions.’²⁹ Ancestral cultures and languages, and the right to be educated in one’s native tongue, became of considerable political importance. In 2000 yet another indigenous uprising, following proposed dollarisation, led to the resignation of Ecuador’s President.

6.2.3 A critique: the practical complexities of inculturated evangelization

The clearest, well-documented impact of the liberationist Church in the diocese of Riobamba has been the commitment of all Catholic organizations to land rights and social justice.³⁰ But let us pause to reflect on the approach of the Guamote Jesuit Mission and its social and pastoral consequences. They exemplify not just the impact of mission on development, but also the impact of development on mission. Effects include the exacerbation of ethnic tensions; the issue of the missionary’s role as an agent for social justice as well as evangelization; and the part of education in this vision of development.

Ethnic tensions were running high at the time of the agrarian reforms. P. Julio’s account stresses the need to include and respect all ethnic groups and cultures. But the mission was always focussed on the needs of the Puruháes, both because of their greater vulnerability – they were the poorest of the poor, ‘the least of these brothers and sisters of mine’³¹ – and for the simple reason that they represented 90% of the population. Thus the mestizos felt disenfranchised. Julio’s stance also determined his understanding of his role

²⁹ *Constitución Política de la República del Ecuador de 1998*, <<https://www.wipo.int/edocs/lexdocs/laws/es/ec/ec016es.pdf>> [accessed 26.11.10).

³⁰ For a more detailed study of the relationship between Proaño and indigenous movements in Chimborazo see Tuaza.

³¹ Matt. 25:40.

as missionary. In the local context, he writes, ‘the process of Incarnation leads us to be “Indian with the Indians” (in the image of St Paul, “a Jew with the Jews, a Greek with the Greeks.”)’.³² For him, this identification led to the possibility of a new way of being men, people, and community; in other words a resurrection, or at least an incarnation in the concrete reality of daily lives.³³ This understanding of the missionary’s insertion into indigenous communities can also be read in the light of *Ad Gentes*³⁴ and *Redemptoris Missio*.³⁵ But does this involve missionaries renouncing their own identity?³⁶

In Guamote, identification with the Puruháes was a clear stand for social justice. It also reflected the very practical need to counteract the – still extant – historical perception of the Church as part of the old oppressive establishment. The explicit rejection of the traditional *paternalismo asistencial* – patronizing top-down charity that does nothing to free its beneficiaries from destitution or dependency – would have been part of this positioning. The team aimed instead at a ‘liberating epiphany’ that would become a visible presence of the Lord, a renewed, visible, tangible church.³⁷

³² Gortaire, *Guamote en camino*, p. 68.

³³ Gortaire, *Guamote en camino*, p. 68.

³⁴ ‘Let them be joined to those men by esteem and love; let them acknowledge themselves to be members of the group of men among whom they live; let them share in cultural and social life by the various undertakings and enterprise of human living; let them be familiar with their national and religious traditions.’ The instruction to ‘gladly and reverently lay bare the seeds of the Word which lie hidden among their fellows’ comes as the result of this social and cultural immersion. *Ad Gentes*, 11.

³⁵ Pope John Paul II, *Redemptoris Missio*: On the permanent validity of the Church’s missionary mandate (Vatican: LEV, 1990), 53–54.

³⁶ Missionaries such as Michael Amaladoss in India and Paulo Suess in Brazil would also reject this identification. Amaladoss has argued that ‘the agent of inculturation is primarily the community that is receiving the gospel, not the missionary who is proclaiming it, whatever his or her efforts at ‘inculturating’ the Word to make it relevant’. Michael Amaladoss SJ, ‘Inculturation and Ignatian Spirituality’, *The Way*, Supplement 79 (1994), 39–47 (p. 40). For Paulo Suess, evangelization must indeed fuse with the indigenous culture and missionaries are existentially involved in the message they convey. But Suess places firm limits to inculturation as regards the missionary, whose ethnic background and previous life experience determine that ‘he will never be an Indian and really, he should not pretend to be an Indian’: solidarity is not identity, and missionaries need to remain grounded in their own identity. Paulo Suess, quoted in Juanito Arias Luna, *La inculturación de la Iglesia en el pueblo indígena de Riobamba* (Quito: Universidad Politécnica Salesiana, 2015), p. 125. Focussing on the Diocese of Riobamba, Arias Luna points to CELAM’s continuing concern for inculturated mission to indigenous populations but makes no mention of the case of Guamote.

³⁷ Gortaire, *Guamote en camino*, p. 67.

The reality of inculturation on the ground, however, is inevitably perceived differently by those who impart the message and those who receive it. Thus indigenous scholars have pointed out that Proaño was nicknamed ‘the Bishop of the Indians’ by the whites because of his habit of wearing a poncho. A poncho, remarks Illicachi wryly, is not enough to make you an Indian.³⁸

Armando Muyolema reminds us that whilst Proaño’s radio station described him as “‘a soldier of Christ”, the older [indigenous] people most attached to the church were, to say the least, critical of [him] for being a communist.’³⁹

Susana Andrade points to the Bishop’s rushed and sometimes uncritical introduction of reform which provoked much hostility from mestizos and whites alike.⁴⁰ In Guamate, in terms of both social impact and denominational affiliation, the alienating effect of identifying with the Indians on the white and mestizo populations should not be underestimated.

Julio’s *Testimonio* is also interesting in what it fails to mention.⁴¹ Thus indigenous women, typically maybe for the time, are practically absent from the *Testimonio*, and children are never mentioned. ‘Participation’ is limited to male community leaders. But the most notable omissions – education, indigenous worldview and the growth of Protestant churches – reflect an outlook that continues to impact on the work of the Mission to this day. Education is a surprising omission on the part of a Jesuit. Apart from a casual note about encouraging literacy so that farmers could read legal documents and teaching domestic duties to young women, there is no mention of education, not even as an accessory to evangelization in the base communities. The Mission’s failure fully to support FyA’s first schools in Chimborazo in the 1980s illustrates the continuing fraught relationship between the Mission and the FyA schools now implanted in the region.

³⁸ Illicachi Guznay, p. 91.

³⁹ Armando Muyolema Calle, ‘Colonialismo y Representación: Hacia una Relectura del Latinoamericanismo, del Indigenismo y de los Discursos Etnia-Clase en los Andes del Siglo XX’ (unpublished Ph.D. thesis, University of Pittsburgh, 2007), p. xiii.

⁴⁰ Susana Andrade, *Protestantismo indígena: Procesos de Conversión Religiosa en la Provincia de Chimborazo*, Travaux de l’Institut d’Etudes Andines, 182 (Quito: Abya Yala, 2004), pp. 146-47.

⁴¹ Some omissions may be due simply to shortage of space, but it is interesting that the diocesan background and the work and methods of Bishop Proaño are never mentioned.

The ‘progressive’ Church supported *indigenismo* in the interest of social justice. As a result there is a clear connection between inculturated evangelization, *indigenismo* and the indigenous sense of identity. Examining this deceptively simple relationship in the context of Salesian missions in both the Sierra and the Shuar Amazonian settlements, Carmen Martínez Novo has focussed on the revival of traditional cultures they promoted. Inculturation was presented as a break from the earlier policy of cultural and economic integration. Yet she judges this process to be top-down still, and concludes that in reality the objective was not so much to preserve the original indigenous social and political organization (Shuar culture was nomadic and notoriously violent) as ‘to transform it to make it more just and efficient’.⁴² In other words, beyond the theological principle the practice of inculturation, while it values identity, can still entail remodelling it. By contrast, Protestant churches seemed to offer something different.

6.3 Protestant missions and development

The growth of Protestant Churches has been documented in the region by the Ecuadorian sociologist Susana Andrade, working in the deprived canton of Colta in central Chimborazo in the 1980s and 90s.⁴³ The new Catholic paradigm of inculturation and liberation theology, she explains, offered respect for indigenous culture and identity, integral liberation from an oppressive regime and integral development. By contrast Protestant missionaries promised salvation, freedom from ideological mestizo control, and economic prosperity. Conversion thus meant leaving the old identities behind and embracing modernisation and progress.

⁴² Carmen Martínez Novo, ‘Luchas por el significado del término “indígena” en la teología de la inculturación’, in *La presencia salesiana en Ecuador: Perspectivas históricas y sociales*, ed. by Lola Vásquez and others (Quito: Universidad Politécnica Salesiana/Abya Yala, 2012), pp. 637–54 (p. 651).

⁴³ Susana Andrade, *Protestantismo indígena: procesos de conversión religiosa en el pueblo indígena de Riobamba* (Quito: Universidad Politécnica Salesiana, 2015).

Protestant missionaries offered ‘a symbolic reconstruction of an identity in crisis and a weakened social cohesion.’⁴⁴

Two Puruhá sociologists have explored the effects of inculturation from an indigenous viewpoint, one focussing on spirituality, the other on identity. For Luis Alberto Tuaza, living for the Kichwas means thinking about God, since for them thought is located not in the mind but in the heart. Thus living in the presence of God means ‘experiencing a God that is mother and father, a God that makes possible solidarity and recognizing God in the other.’⁴⁵ But God is also to be found in nature, and in particular on mountains – in this case, ‘in the majesty of Chimborazo’.⁴⁶ Tuaza contends that this feature has been little understood by evangelization, inculturated or otherwise, with the Catholics preferring to celebrate Mass in enclosed buildings while Protestant missionaries in Chimborazo insist that God is to be found only in the Bible. And he argues that ultimately, what local people want from their priests is spiritual guidance.

Juan Illicachi, for his part, has explored what he describes as the process of constructing indigenous Protestant and Catholic identities in Chimborazo, now the province with the highest proportion of Protestants in the country. His analysis is predicated on Michel Foucault’s model of relations of power and resistance to power. This conditions his assessment of the churches as power structures and their members as either complying with power or resisting it. Within this framework he argues that to some extent all churches are determined to produce ‘docile Indians’, and in particular submissive women. This notwithstanding, his diagnosis reflects that of Andrade. As Catholic contributions to a new sense of indigenous identity he points to Proaño’s commitment to social justice, his break with the ruling landowning classes, the creation of base communities, educational programmes and an indigenous pastoral structure; and, more than anything else, the creation of

⁴⁴ Blanca Muratorio, quoted in Andrade, pp. 41–42. Illicachi gives a similar explanation of the widespread conversion to the success of Protestant missionaries. Andrade also quotes comparable observations in other countries, such as Jean-Pierre Bastian in Mexico and Lalive d’Espinay in Chile.

⁴⁵ Tuaza, *Etnicidad, política y religiosidad en los Andes centrales del Ecuador*, Chacana Series 4 (Riobamba: Casa de la Cultura Ecuatoriana Benjamín Carrión, 2012), p. 182.

⁴⁶ Tuaza, *Etnicidad*, p. 182.

indigenous political organizations. But all this did little to stop the success of Protestantism in the region. Illicachi attributes this success to an association with notions of material development and progress. Nonetheless, he also sees North American missionaries as 'part of a broader project of imperial expansion',⁴⁷ arguing that their position, like that of the Catholic missionaries, was always ambivalent. They may have brought notions of equality, liberty and justice alien to the Catholic Church until the advent of liberation theology. But ultimately they too explicitly worked for the acculturation and integration of what they saw as uncivilized native populations. Conversion in this context meant a rupture with the Catholic rather than the indigenous past.

The 'progressive' Church's support of *indigenismo* encouraged a new self-respect for long downtrodden nations. But the hierarchical structure of the Catholic Church, with a majority of white clergy, was also seen as a survival of the colonial past.⁴⁸ And after the death of Bishop Proaño and the retirement of his successor, the language of the Diocese returned to a more traditional discourse. By contrast, the Protestant churches' introduction of the Bible and liturgy in Kichwa, their literacy programmes and education broadcasts gave rise to a linguistic renewal that contributed to creating new identities and escape from colonialism. And Protestant churches also were prepared to support land claims and demands for equality. Combined with notions of progress and prosperity and an almost exclusively indigenous church leadership, this gave evangelical Indians a positive sense of identity: they were new, autonomous subjects, in full possession of their legal rights and constructing their own church.

Thus there have been several streams of inculturated evangelization at play in the region, vying for influence. In the same way that liberation theology has intellectual rather than popular roots, Catholic action against injustice in Chimborazo did not come from the indigenous populations, 'but rather from intellectuals and theologians dedicated to the indigenous cause: choked with ethnic romanticism and a sense of

⁴⁷ Illicachi, p. 57.

⁴⁸ Few indigenous men have been ordained, and the retention rate for those who were has been dismal.

colonial guilt, they failed to offer spiritual answers and explanations to modern changes and crisis'.⁴⁹ A similar situation was observed in the neighbouring Diocese of Guaranda, which had between 1960 and 1980 a liberationist bishop, Cándido Rada, working on very similar lines to Bishop Proaño and the founder of the *Fondo Popular de Progresión de los Pueblos*, which provided low-interest credit for development projects. Italian Salesian missionaries set up a cooperative and a highly successful cheese-making factory. According to the British anthropologist Annabel Pinker, 'the Salesians [...] conceived the secular as the mediator of religion'⁵⁰ with the result, she contends, that lack of attention to spiritual needs led to widespread conversion to Protestant missions. This also applies in Guamote. There, despite the Jesuits' remarkable achievements in terms of advocacy, land rights and material improvements, the proportion of Catholics has dropped from approximately 90% in 1970 to 25% at the most, the vast majority due to defections to evangelical churches.



Figure 6.5 Dwelling in the páramo. A number of such structures still house families, although most have now been replaced by concrete buildings.

⁴⁹ Andrade, p. 76.

⁵⁰ Anabel Pinker, '¿Una Utopía secular? Religión, Desarrollo y la Creación de Almas Productivas en Salinas de Guaranda', in *La Presencia Salesiana en Ecuador: Perspectivas Históricas y Sociales*, ed. by Lola Vásquez and others (Quito: Abya Yala, 2012), pp. 59–100 (p. 71).

Exploring the relationship between religion and development in central Ecuador, Jill De Temple notes that this entanglement between religion and development has been characteristic of faith and social justice projects.⁵¹ Where faith requires justice, the imperative of grappling with ‘anti-evangelical’ poverty and structural injustice in practice can easily be all-absorbing. This means that FBOs – and missionaries – find themselves embroiled in the same politics, and facing the same predicaments as other NGOs, with the added dilemma of how to present their faith, position it in relation to the local culture, and negotiate the balance between evangelization and development. This background has implications not just for evangelization but also for FBOs providing education for IHD in the region.

6.4 After the reforms: *proyectismo* and the ‘shadow of the hacienda’

While indigenous movements had successes at national level and many *indígenas* opted for the sense of a new, ‘modern’ identity, the picture on the ground at local level is quite different. As a local sociologist Luis Alberto Tuaza has analysed the local imaginary and the customs of the hacienda past in contemporary Chimborazo communities against the practices of NGOs working in that province. Because of the Andean concept of reciprocity, obedience and commitment to care for the land were in the indigenous imaginary a direct consequence of the small gifts and favours ‘bestowed’ by the *amo*, the boss. The old system was meant to disappear with the agrarian reforms and the creation of *comunas* (town councils). But in many cases, mestizo hacienda overseers ended up being elected to positions of power in town councils: Guamate only elected an indigenous mayor in 1996, the first town in the country to do so.

As state involvement in the reforms gradually diminished the era began of what has been called *proyectismo*, referring to the vast number of individual, fragmented projects launched between 1980 and the turn of the century by NGOs and a number

⁵¹ Jill DeTemple, *Cement, Earthworms, and Cheese Factories: Religion and Community Development in Rural Ecuador* (Notre Dame, IN: University of Notre Dame, 2012).

of FBOs, thus maintaining the connection between religion and development in the highlands. Intervention models naturally vary according to the organization, its size and the source of its funding. For the larger ones at least, it has been argued that ‘integral rural development entailed giving up the utopia of structural change in favour of projects with immediate and narrowly focused effects’.⁵² Tuaza has counted more than seventy organizations that have been active in the region since the 1970s, including the Catholic and evangelical churches and the state. Their efforts, he claims, have improved the infrastructure and helped political organization. But they have not eradicated poverty.⁵³

This Tuaza attributes to the fact that collaboration agendas are ‘based on an outsider’s compassionate outlook, without in-depth analysis of reality and without taking account of the views of the potential beneficiaries.’ Most organizations, he continues, claim to work to help ‘the most vulnerable’, a position that implies their own superior wisdom of developed beings with a mission to redeem the underdeveloped from poverty (and an attitude similar to that noted above regarding inculturation). To this extent they are seen like the new *amos*, who ‘give’ for love – but expect in return loyalty, or political support: ‘those who don’t support lose their project’.⁵⁴ It remains the case still that projects, shared schools, even in pastoral areas, are best realized by grouping communities that in the past belonged to the same hacienda. Development, even from local or national state authorities, is obtained through favours or votes. The problem with this, argues Tuaza, is that the notion of legitimate rights is still not properly understood. Another problem, in terms of developing capabilities, is that the sense of agency for transformation is fostered neither by the existing social structure nor by the NGOs and FBOs working in the region. This is a serious issue. The sense of participation and agency fostered by the missionaries has been highly successful in terms of collective action such as national uprisings. But this has not really been paralleled at local or individual level. As

⁵² Victor Breton Solo de Zaldivar, ‘Cooperación al desarrollo, capital social y neo-indigenismo en perspectiva histórica’, *European Review of Latin American and Caribbean Studies*, 73 (2002), 43-63 (p. 46).

⁵³ See also Breton, ‘Cooperación’, p. 46.

⁵⁴ Tuaza, ‘La continuidad’, p. 130

reforms can later be circumvented, the effect is that little changes in the daily lives of the majority of people.

Economically, international NGOs are now supporting projects for minority groups, attacking, it has been argued, the symptoms of poverty – with ad hoc and insufficient measures – rather than its structural causes. Most of the private agencies in operation in Ecuador receive a large proportion of their incomes from governmental and/or multilateral organizations from the North that reject anything that could question neoliberal hegemony.

The neoliberal agenda seemed to have muted the notion of structural sin. There is no common agenda for the aid provided by different agencies, and no articulation between projects, which accentuates fragmentation in rural areas. As levels of rural poverty remain high, observers agree that improvements are not meeting expectations. Indigenous movements have weakened considerably in the last twenty years and it is too early to tell whether the October 2019 uprising against a fuel price increase signals a revival in indigenous militancy. Against this general background the role of education in preparing for civic participation and promoting agency and human rights will be a crucial one.

6.5 Andean structures of living together

6.5.1 The *ayllu*

All the rural primary schools in the study serve a catchment area comprised of one or several small communities and have an exclusively indigenous intake. The socio-economic background here is that of the *ayllu* or *comunidad*.

An *ayllu* is an autonomous community composed of loosely related families who own their land and organize their work and resources in common. This means the need to cultivate such values as reciprocity and solidarity. The



Figure 6.6 Shepherds near Ozogoché.

description below of a central Chimbroazo ayllu is based on a context report drawn up in 1999–2001 by such a community in preparation for a state-funded environmental project promoting a more effective management of the páramo, the local tundra-like high-altitude ecosystem. The title, *Heritage for our children*,⁵⁵ reflects the self-awareness of the community as rooted in the past but looking to the future: it combines the consciousness of a social and cultural tradition and the resulting structures of living together, with the recognition that new environmental practices are needed to ensure a life worth living locally. The context described by *Heritage for our children* is representative of small far-flung communities in Chimborazo, including the

⁵⁵ Alfredo Ati, *Herencia para nuestros hijos: sistematización del proceso de elaboración del plan de manejo de los recursos naturales del páramo*, Estudio de Comunidad y Páramo Studies 1 (Quito: Abya Yala, 2002). The report is presented as the outcome of a two-year reflection process involving all the members of the community.

catchment areas of all rural schools in the study. Until the 1960s the land surrounding the *ayllu* concerned was part of a large hacienda run in the usual manner. At the time of the agrarian reforms the landowner and the community were locked in a judicial battle for seven years before the latter was finally granted ownership of 700 ha. of land in 1981. The state-funded Integral Rural Development project then provided a certain amount of technical support to help modernize agricultural practices; this was accompanied by a literacy campaign. A Belgian project in the early 1990s provided agricultural credit, tree-planting and sheep. Electricity and latrines made their first appearance at that time. Other projects in the 1990s involved World Vision, a large Christian FBO which provided running water, a rural tree development project, and the intervention of several organizations working for environmental development.⁵⁶ The first local school was opened in 1992. A driveable road linking the *ayllu* to the Pan-American Highway, seven kilometres of steep slopes away, was first opened in 1998 (to this day it remains un-tarmacked and liable to flooding, although a bus shuttle carries town-dwelling teachers from Riobamba to the local schools and back every day). Easy access to the outside world is thus a relatively recent event. There are still villagers who have never been as far as Riobamba, fifty kilometres away, and travelling to Guamote, less than twenty kilometres away, is restricted to going to market and, rarely, attending the hospital. The *ayllu* lies at an altitude of approximately 3,600 metres and the climate is harsh, with frost possible at night but temperatures of up to 25–30°C during the day. Migration, mainly male, was estimated at 22% at the time of the report and is probably higher now. The illiteracy rate is given as 16%, which seems rather low since the official illiteracy rate in the canton concerned in 2007 was reported as 25%. The home language is a Northern version of Quechua⁵⁷

⁵⁶ The number of existing projects around this tiny community confirms that *proyectismo* is alive and well in the region. They include environmental projects (UN, Fundación Ecociencia), agrarian projects (USAID, International Potato Centre) and the study of ancestral beliefs on health and natural medicine (EU).

⁵⁷ The Incas spoke a form of Quechua, a pre-Columbian family of languages in the East of South America. The oldest written record of Quechua was written by the missionary Domingo San Tomas whose Quechuan grammar, *Gramatica o arte*, was published in 1560. A number of official documents in the local language were transcribed in Latin characters. See Alfredo Torero, *El quechua y la historia social andina* (Lima: Universidad Ricardo Palam, Dirección Universitaria de Investigación,

known as Kichwa.⁵⁸ Although school attendance has traditionally been patchy, especially for girls, the local school opened in 1992 is a bilingual school and everyone except the very old has acquired knowledge of Spanish. This would apply throughout the region. Nonetheless, at all rural school meetings attended by the researcher fathers used Spanish, but mothers almost invariably expressed themselves in Kichwa.⁵⁹

As regards social organization, *Heritage for our children* states that duties and responsibilities are divided according to the old Kichwa custom, on the basis of the biological and social differences between men and women.⁶⁰ Women consequently look after the children and the family's health as well as taking care of the animals and housework. Men work in the fields and corral the animals in the páramo. According to the report at least, men also help with weaving and sometimes even the evening meal, as well as the children's homework. The men are normally the ones who deal with business meetings in the town and attend community meetings, 'although there are women and young people who take part in this activity'.⁶¹ The sale of

1974); and *La familia lingüística quechua: América Latina en sus lenguas indígenas* (Caracas: Monte Avila, 1983).

⁵⁸ Kichwa, or Kichwa shimi ('the Kichwa language'), also known as Runashimi ('the language of the people'), is the version of Quechua now spoken in Ecuador and Colombia. The first grammatical description of Kichwa and the transcription of the earliest known manuscript in that language were the work of the 17th century Jesuit Hernando de Alcocer, (Alcoçer, Hernandus de, 'Breve declaración del Arte y Vocabulario de la lengua del Ynga ad Usum Provinciae Quitensis', *Archivum Romanum Societatis Iesu*, Opera Nostrorum, 355.) See Luca Ciucci and Pieter C. Muysken, 'Hernando de Alcocer y la Breve declaración del Arte y Vocabulario de la lengua del Ynga', *Indiana* 28 (2011), 359-393. The number of Kichwa speakers in Chimborazo is currently estimated to be between one and two millions.

⁵⁹ Fluent Spanish is spoken by all in larger towns, where the use of Kichwa is considered as denoting inferior social status.

⁶⁰ Many historians are of the opinion that Inca cultures 'saw the two genders as complementary parts of a whole, not as a hierarchy.' Terence N. D'Altroy, *The Incas* (Maiden, MA: Blackwell, 2002), p. 292. The division of labour described by D'Altroy for example is not dissimilar to that described in *Heritage*, including spinning and weaving for the men where necessary (although combat was the preserve of men). This division of labour was not understood by the Spaniards. Inheritance went through both the male and female side of the family in parallel lines, i.e. men inherited from their fathers and women from their mothers. See Barnabé Cobo, *History of the Inca Empire: An Account of the Indians' Customs and Their Origin, Together with a Treatise on Inca Legends, History, and Social Institutions*, trans. and ed. by Roland Hamilton, Texas Pan American Series (Austin: University of Texas Press, 1979); and Michael A. Malpass, *Daily life in the Inca Empire*, 2nd rev. edn, The Greenwood Press Daily Life Through History Series 30 (Westcott, CT: Greenwood Press, 2009).

⁶¹ Ati, pp. 49-50.

agricultural products is similarly divided between husband and wife: the women are usually those who go to market to sell grain, vegetables and small animals, while men deal with larger animals. Income comes from the sale of sheep and agricultural produce: potatoes (the staple diet), beans and milk (the dairy industry has been an important source of income in the highlands and at the time of writing the fall in milk prices was being keenly felt). An *ayllu* is governed by a council led by an elected chair and vice-chair which makes all decisions in community matters. The council has the right to maintain order by the use of indigenous justice (*justicia indígena*)⁶² and guards its autonomy fiercely. In theory the governance process also includes women although in practice they are not elected leaders of community councils. The *ayllu* described here has never part of a Mission's territory but it is served by a parish some twenty miles away, with mass said every Sunday in the tiny town down the mountain. The presence of a charismatic liberationist parish priest in the 1970s has meant few conversions until the turn of the century, a process probably helped by the fact that rural areas in the region are extremely conservative. There were conversions later though, and the divisions between Catholic and evangelicals exist here as elsewhere. *Heritage for our children* notes, without any apparent awareness of contradiction, the existence of local ancestral sacred sites still used for prayer, including a 'miraculous' non-Christian stone. Certainly the social and religious lives of the community are inextricably intertwined, a phenomenon highlighted by anthropologists working in the region such as Jill DeTemple, Annabel Pinker or Barry Lyons.⁶³ Among Catholics there is evidence of adherence at least to the rites and practices of the Church, but co-existing with faith in 'ancestral' beliefs; whereas conversion to an evangelical church

⁶² According to the 2008 Constitution *justicia indígena* regulates the life, governance of each *comunidad* according to ancestral Andean custom. It constitutes a legal framework independent of the national legal system and is applied by communities without outside interference, including in criminal cases. Judgments and punishments derive from cultural norms and are not aligned with the national justice system.

⁶³ See Barry J. Lyons, *Remembering the Hacienda: Religion, Authority and Social Change in Highland Ecuador*, Joe R. and Teresa Lozano Long Series in Latin American and Latino Art and Culture (Austin: The University of Texas Press, 2006); and Annabel Pinker, "'Path is made by walking': Utopianism, co-operative development, and missionary practices in the Ecuadorian Andes' (unpublished Ph.D. thesis, University of Cambridge, 2011).

means that ancestral beliefs have to be left behind. But children in intercultural bilingual education centres, the only type of primary education in rural areas, are taught old beliefs and practices in school as part of their ‘cultural heritage’. This is the norm rather than the exception in the region, an inevitable counterpart to the drive to value ancestral beliefs and customs to underpin indigenous identity.



Figure 6.7 Mountain kitchen. Communities are not connected to the gas network and cooking is done on wood fires in the main room – often the only room – of the house.

Little appears to have changed since *Heritage for our children* was produced almost twenty years ago. One change, already mentioned, would be the increasing number of conversions to evangelical churches. The parish is large and the parish priest is not a frequent visitor to the community. Here as elsewhere in the region poverty levels remain high but the voice of the diocese has changed. Its language is now more traditional and it glosses over two vital factors in the local religious landscape: protestant evangelical churches and the ancestral worldview. In this sense there is a sharp division between the hierarchical church and its teaching on the one hand, and the lived experience of local families. This will become apparent in Chapter 8, in

the case of the one FyA school which caters for a sizeable number of evangelical families.

There are features that *Heritage* does not mention although evidence is readily available from other sources. One notable fact is the high level of domestic violence, clear from national as well as regional statistics and highlighted in the field study in answers to the questionnaires by both children and their mothers. Another important issue not mentioned is that of child labour. UNICEF figures published in 2018 indicated that Chimborazo was one of the provinces with the highest rate of child labour for children aged 5 to 14: 20% overall against 26% for indigenous children. For indigenous 15 to 17-year-olds the figure is 39%.⁶⁴ A report on child trafficking in Ecuador in 2009 also highlighted the existence of such practices in the region, usually affecting girls in their teens.⁶⁵ Silence is observed on such matters and it would be difficult for outsiders to discover the current state of affairs. Finally, it is interesting that the *Heritage* report, written before the 2008 Constitution, speaks about old attitudes to work and social organization but never mentions the ancestral ideal of Buen Vivir or Sumak Kawsay.

6.5.2 Buen Vivir/Sumak Kawsay

It is largely due to the support of indigenous movements that Rafael Correa was elected President first in 2007 then again in 2012 on the socialist ideals of a Citizen's Revolution. And at the time of its publication in 2008, the new Constitution was regarded as one of the most liberal in Latin America in terms of indigenous rights. Its prologue first invokes the name of the Pachamama – Mother Nature – alongside the name of God. The Constitution

⁶⁴ UNICEF Ecuador, *Situación del Trabajo Infantil en Ecuador (2018)*, <<https://www.unicef.org/ecuador/comunicados-prensa/situación-del-trabajo-infantil-en-ecuador>> [accessed 29.12.19]. The proportion of working children is decreasing, although more slowly in the case of indigenous children.

⁶⁵ CARE Ecuador/FLACSO, *Trabajo infantil y niñez indígena: informe final (2009)*, <<http://www.care.org.ec/wp-content/uploads/201404/Trabajo-Infantil-y-niñez-indígena.pdf>> [accessed 29.03.18).

then introduces the Kichwa principle of Sumak Kawsay or Buen Vivir (leading a good life) together with the Rights of the Pachamama as an alternative form of development. Sumak Kawsay, it states, ‘requires that individuals, communities, peoples and nationalities effectively enjoy their rights and fulfil their responsibilities within a framework of interculturalism, respect of diversity, and harmonious living with nature.’⁶⁶

Analysing this very first use of an indigenous concept as the foundation for political life, the Ecuadorian philosopher David Cortez hailed it as the end of the mono-cultural, euro-centric understanding of civilisation.⁶⁷ Comparing further the Western and Amerindian concepts of a good life, Cortez describes the latter as holistic because it sees human life as part of a worldview in which all is interrelated. The focus is thus on the relational, on reciprocity, on complementarity. By contrast Greek thought, the Christian biblical tradition and modern humanism divide man from nature and the spiritual from the material, giving a lower status to the material and to nature.

The introduction, or re-introduction, of Sumak Kawsay brought to the fore once again the old fracture in Latin American self-perception. Some saw this as a break with civilisation and a rejection of progress, since ‘indigenous populations have not reached a sufficient level of rationality, liberty and democracy, the basic pillars of civilisation.’⁶⁸ For others, on the contrary, it indicated a journey towards modernity, and parallels were drawn between the good savage and Latin American *indigenismo*. For others still, it was simply populism – a stance adopted in order to win indigenous votes.

⁶⁶ Constitución de La República Del Ecuador 2008, <http://www.oas.org-juridico-PDFs-mesicic4_ecu_const.pdf> [accessed 12.12.19). Bolivia followed suit in 2009 with a new constitution promoting ‘living well’ (*Vivir Bien*) or the ‘good life’ (Suma *Qamaña*).

⁶⁷ David Cortez Jiménez, ‘Genealogía del “Buen Vivir” en la nueva constitución ecuatoriana’, in Raúl Fornet-Betancourt (ed.), *Gutes Leben als humanisiertes Leben: Vorstellungen vom guten Leben in den Kulturen und ihre Bedeutung für Politik und Gesellschaft heute, Denktraditionen im Dialog, Studien zur Befreiung und Interkulturalität*, xxx (Mainz: Wissenschaftsverlag, 2010), 227–48.

⁶⁸ Group ‘Tradición y Acción’ (‘Tradition and Action, for an authentic, Christian and strong Ecuador’), quoted by Cortez, p. 230.

This official recognition of ‘non-Western’ structures of living together and development attracted much attention, even hope. In the ancestral worldview living well is defined as being part of and living in harmony with both one’s community and the cycles of Mother Nature. The Andean notion of time as ever-repeating cycles makes the concept of linear development largely meaningless.⁶⁹ Consequently, in both Ecuador and Bolivia BV was presented as an alternative to the neoliberal view of development and mass consumption, to be achieved by reviving the ancestral values and ways of life disrupted by colonisation. For anyone yearning for an alternative to neoliberalism, this was a major breakthrough. Academic contributions in the following years reflected the excitement at the possibility of a new ‘model for mankind’.⁷⁰

Further analysis of the concept, however, gave unexpected results. The first *National Plan for Buen Vivir* mentions other models of living well, in particular Aristotle’s, and there is clear evidence of the influence of both *eudaimonia* and other theories of human flourishing and even capabilities behind the formulation of BV in the Constitution.⁷¹ To what extent does this matter? The sociologist Catherine Walsh, highlighting the dimensions of relationality, correspondence, complementarity and reciprocity that come from being part of a community, contrasts the notion of living well – as against living better – with that of unilinear progress: ‘development is the realization of buen vivir, and the construction of buen vivir is what enables

⁶⁹ *Plan Nacional para el Buen Vivir 2009–13*, English summary (Quito: SENPLADES, 2009), pp. 17–18. Available at <<https://www.planificacion.gov.ec/wp-content/uploads/downloads/2016/03/Plan-Nacional-Buen-Vivir-2009–2013-Ingles.pdf>> [accessed 08.11.19]. In connection with BV the main goals for implementation are listed as: unity in diversity, life in society for human fulfilment, equality and social cohesion, complying with universal rights and promoting human capabilities, harmonious relations with Nature, solidarity, liberating work and free time and participative and deliberative democracy.

⁷⁰ Oviedo, quoted in Victor Breton Solo de Zaldivar, ‘Etnicidad, Desarrollo y “Buen Vivir”’: Reflexiones críticas en perspectiva histórica’, *European Review of Latin American and Caribbean Studies*, 95 (2013), 71–95 (p. 81). According to Breton BV/SK is a construction ‘formally critical of neoclassical economy and conventional Developmentalism, but firmly grounded on Western episteme and with an apparent desire to ‘open itself’ to intercultural dialogue between different forms of knowledge’ (p. 80).

⁷¹ Breton, ‘Etnicidad’, p. 88.

this vision of human and social development.’⁷² For Breton, certainly, this ‘invented tradition’ had at the time ‘enormous transformational power’ as an alternative to the neoliberal ‘ethnocidal’ vision of development.⁷³ Sarah Radcliffe, for her part, sees in BV a mixture of Andean worldviews, left-wing politics, environmentalism, feminism and theology that ‘selectively draws on indigenous border-thinking’, further amended to include social inclusion and socialist agendas around work and labour and setting in motion institutional and programmatic transformations to attain equality and diversity.⁷⁴

The understanding of BV as an alternative to neoliberal development has also led some scholars to draw a connection between BV and a capability-based approach to justice and human flourishing. Deneulin, for example, focusses on the contribution of Ecuadorian indigenous social movements to the understanding of wellbeing and social justice.⁷⁵ Writing towards the end of Ecuador’s first 2009–13 BV National Plan, she describes the history of peasant and indigenous groups gradually mobilizing from the time of the agrarian reforms to demand their rights to the land, then to their own identity, values and culture. As noted above, indigenous social movements proved a major influence in the elaboration of the 2008 Constitution and the Buen Vivir plans – hence Deneulin’s conclusion that BV represents a victory for social indigenous movements. It is the combined values of equity, dignity, reciprocity, solidarity, and the concern for the environment that leads her to see BV as a possible new model, an alternative to other human development theories. But even in 2013 her conclusions already hinted at some contradictions and the danger of co-optation. Events since then have included a state policy of aggressive extractivism in oil-rich Amazonia, flouting the

⁷² Catherine Walsh, ‘Development as *Buen Vivir*: Institutional Arrangements and (De)colonial Entanglements’, *Development*, 53.1 (2010), 15–21, p. 19.

⁷³ Breton, ‘Etnicidad’, p. 88.

⁷⁴ Sarah A. Radcliffe, *Dilemmas of Difference: Indigenous Women and the Limits of Postcolonial Development Policy* (London: Duke University Press, 2015), p. 257.

⁷⁵ Deneulin, ‘Justice and deliberation about the good life: The contribution of Latin American buen vivir social movements to the idea of justice’, *Bath Papers in International Development and Wellbeing*, 17 (Bath: Centre for Development Studies, 2012).

rights of the local population and the Pachamama alike, as well as falling oil prices, the increasing impact of the worldwide economic crisis, and finally the partial disenfranchisement of indigenous movements. All have combined to dash the hopes raised by the inclusion of BV in state policy. State rhetoric on BV has not changed, but there is currently much discontent at grassroots level and a great deal of disillusionment as to the real extent of any ‘victory’ for indigenous social movements.

For her part, Ana Carballo has explored ‘the ethical contributions of indigenous philosophies’ of the Ecuadorian Andes explicitly from the viewpoint of the CA.⁷⁶ Her analysis starts from the pivotal aspects of Andean cosmovision: the central role of the *ayllu* and the importance of nature (described here as a spiritual connection). In spite of acknowledging (unspecified) changes over time, her assessment of the *ayllu* and BV as essentially social and collective leads her to raise the issue of individual vs. collective capabilities. BV entails values of solidarity and reciprocity which, in Carballo’s view, go well beyond Sen’s promotion of individual freedom: ‘the principles that guide the Sumak Kawsay cannot be separated from the community, cannot be achieved at individual level’.⁷⁷ At environmental level, she expresses her disappointment that the rights of Mother Nature have been diluted to a concern for sustainable development, arguing that the ‘spiritual connection between humans, territory and nature’ is central to achieving life in plenitude beyond the CA.⁷⁸

⁷⁶ Ana E. Carballo, ‘Rereading Amartya Sen from the Andes: Exploring the Ethical Contributions of Indigenous Philosophies’, *Development and Postcolonial Studies Working Paper Series 3*, University Kassel (2015), p. 6.

⁷⁷ Carballo, p. 20.

⁷⁸ Carballo, pp. 25-26. Whilst both Deneulin and Carballo equate Buen Vivir and Sumak Kawsay, some scholars differentiate between BV as the government-led agenda – an example of biopower – and SK, considered to be a genuine expression of indigenous cosmovision. According to Radcliffe, for example, SK is something which indigenous women claim to understand well as ‘a dignified form of living in dynamic relation with more-than-human socionatures’ which they can influence in implementing, giving them the possibility of a ‘contextual response to postcolonial exclusion’ (p. 258). However, the *Second National Plan for BV (2013–2017)* firmly reasserted the Andean roots of the concept, stating categorically that ‘Buen Vivir is Sumak Kawsay’ and defining it now as a ‘social idea of solidarity and redistribution different from the Aristotelian idea of the Good Life. Buen Vivir is a mobilizing social idea which goes beyond the concept of development which rules in the Western tradition.’ *Nacional Plan del Buen Vivir 2013–17*, English version: *Good Living National Plan 2013–2017: a better world for everyone* (Quito: SENPLADES, 2013), p. 16.

Beyond the rhetoric, is the ideal of BV/SK the mirage of a solution that attracts us just as the ideal of the noble savage appealed to eighteenth and nineteenth century ‘civilized’ society?⁷⁹ The notion seems to reflect an idealized social structure, stressing the notions of solidarity and reciprocity, equity, equality and dignity for all, and harmony with one’s community as well as a spiritual relationship with nature. But to what extent is it reflected, for example, in the very specific example of the not untypical community outlined in *Heritage for our Children*, which omits to mention domestic violence? Can it, as Radcliffe suggests, be used as a tool for women to assert their influence over community life in such a context? Despite some historical evidence that duties before colonisation were divided equally between genders, Andean culture is notoriously patriarchal, with women traditionally treated little better than domestic slaves. Domestic violence is a national issue, affecting both women and children, and *feminicidio* – the murder of women by their husbands or partners for failing to fulfil male expectations of the female role – is particularly high in Chimborazo.⁸⁰ In rural areas illiteracy rates among indigenous women have traditionally been much higher than the men’s and girls have rarely until recently been allowed

<<http://www.planificacion.gob.ec/wp-content/uploads/downloads/2013/12/Buen-Vivir-ingles-web-final-completo-pdf>> [accessed 13.09.18).

⁷⁹ As ‘an idealized concept of uncivilized man, who symbolizes the innate goodness of one not exposed to the corrupting influences of civilization’ (<<https://www.britannica.com/art/noble-savage>> [accessed 18.06.2020]), the theme of the noble savage recurs in 18th and 19th century literature, for example in Jean-Jacques Rousseau, François-René de Chateaubriand and James Fennimore Cooper. Helen Gardner outlines the history of the concept in ‘Explainer: the myth of the Noble Savage’, *The Conversation*, 25.02. 2016, <<https://theconversation.com/explainer-the-myth-of-the-noble-savage-55316>> [accessed 18.06.2020].

⁸⁰ DINAPEN, the police branch dealing with children and adolescents, reported 534 cases of disappearance, physical and psychological abuse and abandonment in the province in 2013. ‘Maltrato a menores se mantiene en hogares de Chimborazo’, *El Telégrafo*, 25th January 2014, <<http://www.eltelegrafo.com.ec/noticias/regional/1/maltrato-a-menores-se-mantiene-en-hogares-de-chimborazo>> [accessed 26.12.2019]. The police in Guamote confirmed to the press in 2010 that they dealt with approximately ten cases of violence, including murder against women, each month in the more accessible parts of Canton Guamote, violence in remote communities not being reported. ‘Feminicidio crece en medio del machismo en comunas indígenas’, *El Universo*, 11th April 2010, <<http://www.eluniverso.com/2010/04/11/1/1447/feminicidio-crece-medio-machismo-comunas-indianas.html>> [accessed 26.12.2019]. Communities prefer the guilty husband to be dealt with by indigenous justice, which usually involves a physical punishment as well as working to support their children until the age of 20 ‘Dirigencia indígena preocupada por Guamote’, *El Universo*, 11th November 2010, <<http://www.eluniverso.com/2010/04/11/1/1447/dirigencia-indigena-preocupada-guamote.html>> [accessed 26.12.2019].

to receive an education. All this would seem to suggest that, at least between colonisation and the turn of the century, Sumak Kawsay was rather the equivalent of a social contract with rights and justice limited to adult males in the community. Similarly, the oneness with Nature is grounded in the natural awareness of agricultural communities that their lives are inextricably linked with the seasonal cycle of the land and the rearing of animals for work and subsistence. In this sense, there is indeed a deeply spiritual connection between nature and the creatures it sustains.

A common thread links the contributions discussed above. While BV/SK goes beyond Western concepts of human development, there is a commonality between the Andean notion of living well as formulated in Ecuador and the CA. This may be partly because the definition of BV/SK has been reformulated along the principles and terminology of the latter as well as human rights. This is only one correspondence between BV/SK philosophy and other worldviews, and two aspects deserve further investigation. The first relates to a transcendental dimension – Maritain’s ability to know God – which all the authors above acknowledge as crucial to Andean culture but are disinclined to name, let alone explore. It is variously described as ‘spiritual’,⁸¹ ‘extra-human’⁸² or ‘more-than-human [...] sionatures’.⁸³ There is a reluctance to use the word ‘religious’, although Andean cosmovision has always been associated with a set of religious beliefs with well-defined rituals and practices. Secondly, and surprisingly, since Ecuador is still considered to be a largely ‘Catholic’ country, there seems to have been no interest to date in exploring the correspondence between BV/SK and Christian values, and more particularly BV/SK and CST on human development. This is disappointing: secularism has made very few inroads in indigenous mountain communities, with the result that approximately 90% of the population there belong to a Christian

⁸¹ Deneulin, ‘Justice and Deliberation’, p. 3.

⁸² Carballo, p. 20.

⁸³ Radcliffe, p. 258.

denomination.⁸⁴ Yet successful inculturation must mean Christian values and BV/SK values are lived side by side, each colouring the lived experience of the other, both conflating to shape indigenous identities and their aspirations for fulfilment, with a balance between collective and individual rights. For education as well as mission, this points to the possibility of successful inculturation based on the development of the relevant capabilities.

6.6 Contemporary Chimborazo: towards a list of relevant capabilities

Official statistics on Ecuadorian provinces show that Chimborazo is one of the poorest provinces in the land.⁸⁵ According to official figures based on the last national census (2010) 94.6% of the population lived in rural areas, and 54.6% of the population was under 20 years old. In 2010 more than half the population was considered to be living in poverty in terms of unsatisfied basic needs. The two central cantons, Colta and Guamote, are particularly affected with a level of unfulfilled basic needs of 95.5% in 2010, currently standing at approximately 90%.⁸⁶ Maternal deaths due to inadequate or non-existent care during pregnancy and labour remain particularly high in Chimborazo: 56.73 per 100,000 live births against 44.6 nationally in 2015.⁸⁷ Child malnutrition is widespread, due to scarcity of the right nutrients and poor understanding of what constitutes a healthy diet. Apart from road

⁸⁴ In Chimborazo generally, about 75–80% of these would be evangelical and 20% Catholic.

⁸⁵ General data on the province can be found at <<http://www.chimborazo.gov.ec/chimborazo/?p=377>> [accessed 05.12.2019]. The website <<http://ecuadorencifras.gob.ec>> provides statistical data on each canton; for Guamote this can be found at <http://ecuadorencifras.gob.ec/documentos/web-inec/Bibliotecas/Fasciculos_Censales/Fasc_Cantonales/Chimborazo/Fasciculo_Guamote.pdf> [accessed 16.02.2019]. Provinces also publish online their own five-year development plans.

⁸⁶ <<http://www.planificacion.gob.ec/en-chimborazo-se-articulan-gestiones-para-reducir-brechas-de-pobreza>> and <<http://www.planificacion.gob.ec/wp-content/uploads/downloads/2015/11/Agenda-zona-3>> [accessed 26.03.2018]. As these averages also cover urban areas, it should be borne in mind that all figures would be worse in the rural areas.

⁸⁷ Statistics from Ecuador's Instituto Nacional de Estadística y Censo, *Compendio Estadístico 2015*, pp. 79–89, <<https://www.ecuadorencifras.gob.ec/documentos/web-inec/Bibliotecas/Compendio/Compendio-2015/Compendio.pdf>> [accessed 05.12.2019]. According to WHO statistics UK maternal death rates currently stand at 7 per 100,000 live births. The overall under-5 mortality rate in Ecuador is 14 per 1000 live births against 4 per 1000 in the UK. World Bank Open Data, <<https://data.worldbank.org/indicator/SH/DYN/MORT?locations=EC-GB>> [accessed 29.12.2019].

accidents (the second main cause of death for men) the main causes of death are heart and cardiovascular diseases, diabetes (the main cause for women) and respiratory diseases. As regards education, illiteracy in the rural areas has fallen dramatically since the 1960s, but the rate was still 28.6% for men and 35.7% for women in 2001, and 13.5% overall in 2010. The majority of cantons in the province are officially recognized as bilingual, with all rural primary schools designated as intercultural bilingual centres. This includes the three schools in the sample and the rural primary control.

Whilst commercial and agricultural projects have brought some degree of income to individual communities, extreme poverty remains the reality for much of the rural population. Haciendas may have been dismantled, but with a substantial amount of property acquired by speculators or cooperatives land distribution remains unequal. In people's imaginary the 'shadow of the hacienda' persists at local level with a crucial impact on autonomy and agency (see Section 9.2.1 below). In contacts with the outside world the awareness of social distinctions persists even in officially bilingual cantons, and in the city discrimination against *indígenas* is often blatant at every level.

Divisions between Christian denominations within communities have been bitter and remain problematic. At diocesan level there are complaints of poor coordination between diocesan agencies, inadequate training of catechists, insufficient recruitment and low retention of indigenous priests:⁸⁸ mission to the indigenous population is thus not an unmitigated success. The Jesuit Mission in Guamote now focusses on micro-enterprise, especially for women, alongside its work of evangelization. At the time of writing it remains removed from any formal education in the area.

What does this analysis, these structures of living together, mean in terms of freedoms and capability expansion for the indigenous children and their parents?

⁸⁸ See Dayssi Almeida M., Edwin Cardinas E. and Digna Pauta P., 'La inculturación de la Iglesia en el pueblo indígena andino de la Diócesis de Riobamba durante la década del 2000–2010' (B.A. dissertation in Pastoral Theology, Universidad Politécnica Salesiana, 2013), at <<https://dspace.ups.edu.ec/handle/123456789/6609>> [accessed 14.08.19]. Arias Luna also points to the continuing difficulties faced by the Pastoral Indígena.

And more crucially, what should be the role of education – especially Ignatian education for vulnerable children – in promoting these capabilities?



Figure 6.8 Market day in Guamote.

Given the statistics, the first issue remains the fulfilment of basic necessities: life, health, food and shelter. Regrettably this still cannot be taken as a given. In rural areas in particular women and children are disproportionately affected. Government intervention since 2007 has made a definite improvement, but reforms have slowed down as oil prices have fallen and state resources dwindled; there is no doubt further

government intervention is needed. In the meantime, current statistics mean that fulfilling basic needs will inevitably be part of a missionary enterprise. The data also point to a crucial role for education beyond literacy and numeracy: this includes teaching nutrition and general health and safety principles in a context where these are widely disregarded. The development of other potentialities, other freedoms, depends first on fulfilling these needs for the present generation of children. The importance of educating for maternal and family health is also widely acknowledged and makes education in this connection even more crucial.

Continuing with Nussbaum's list of core capabilities as reflected in the questionnaires (see Section 4.2 above), the affective dimensions particularly important for growing children focus on love of family and friends. Children everywhere are friendly and always ready to show affection. Thus these aspects are not neglected and answers to the questionnaires should confirm this. In view of the culture of machismo and the ensuing high level of domestic violence, however, bodily integrity (safety and freedom from violence) is a different issue, and sadly answers to the questionnaires confirmed this (see 8. 2 below). Again, education has a role to play in this context.

The right for children to be taught in their own language according to their own culture was recognized in the 2008 Constitution. 'Intercultural bilingual schools' have a specific curriculum, adapted to the culture and way of life of the Kichwa-speaking community. Due to the politicisation of language rights, however, it is a moot point whether implementation always works to the greater benefit of the children concerned. While young children in Spanish-speaking schools learn about life around them but also the wider world beyond, children in bilingual schools are taught how to prepare the land to seed potatoes and learn little about life beyond their province, or indeed their own *ayllu*. These skills may be culturally appropriate, but is there not a danger of perpetuating social stratification and restricting individual freedoms if such policies are enforced too rigidly? This is another dilemma for education. One question will be how FyA has adapted its education 'package' to cater for the particular needs of bilingual, bicultural families.

Ecuador's 2008 Constitution guarantees political and religious freedom. The situation at the time of the study did not threaten either. The core issue here is creating a culture where all understand the importance of participating in decision making and have the skills to do so – again, education is key in imparting these skills and attitudes. Gender inequality, however, is a major issue which is so ingrained in mentalities that it becomes unconscious. Examples of bias in education observed during fieldwork showed that it will take at least a generation before policies and good intentions make any real impact. Gender inequality and its connection with domestic violence are, in theory at least, recognized as major issues nationally.

The ancestral ideals of solidarity, reciprocity, *convivencia* (living in harmony with others) and respect for nature promoted by BV/SK are structures of living together that should, in theory, rule the lives of *ayllus*. Responses to the questionnaires as well as observation on the ground show this to be not as strong a feature as expected. Nonetheless, these principles provide a powerful cultural underpinning for Christian values of love and reconciliation. This widens education to the development of the ethical, spiritual and transcendental capabilities which a Christian education entails.

This list of individual, collective and spiritual capabilities, adapted to this local context and the vision of a Christian education, formed the basis of the questionnaires used in fieldwork.

6.7 Conclusion

Committed Christian action for social justice has helped shape modern Chimborazo. But assessing the outcomes of inculturated evangelization is a complex task. The Catholic Church has made every effort to overcome its past as part of an oppressive establishment and its contribution to social justice has been invaluable, with wide-ranging socio-political repercussions at national level. But arguably the balance between the social and other apostolates may have put too much weight on social work. As a result the outcome in terms of evangelization has not always come up to expectations. It is also disappointing but maybe inevitable that inculturation should have been to some extent connected to a 'civilizing' process by outsiders. This

aspect, which is also noticeable in the work of NGOs in the region, accentuates the shadow of the hacienda – the sense of dependency which is palpable in the region. It is ironic maybe that the liberationist Church of Riobamba should have been able to develop the sense of agency of indigenous groups at political level but not changed individual mentalities, what Tuaza calls their imaginary: little has changed in this respect. The structures of living together in the region – the long-lasting survival of the colonial past, the hacienda system, a very conservative church followed by a liberationist approach, ethnic and social discrimination, gender inequality, indigenous rights and new emphasis on Sumak Kawsay, part of the politicisation of Andean worldview – determine what children can be and do, and what opportunities they are likely to have, and be able to use, in the future. With a sound knowledge of the local context we now return to our original question: how does Ignatian education in such a context promote IHD and social transformation, and with what results? The case study will try to answer these questions.

Chapter 7. Evaluating the impact of FyA

Process and findings



Figure 7.1 Chimborazo mountain road. FyA's ambition to provide education for social transformation 'where the tarmac stops' remained very much a reality at the time of the fieldwork (2016–17).

The first step in the pastoral circle method adopted for this study (see 3.9 above) is insertion. With a view to evaluating the work and impact of FyA in a ‘frontier’ context most of the fieldwork period in 2016–2017 was thus spent working with FyA and its staff at local level. The first stage was to develop an understanding of FyA’s ‘way of proceeding’ and how it could be adapted to the circumstances of any given school. It required participating in the life of the schools and this involvement continued throughout the period of fieldwork. The task of requesting and obtaining the school communities’ participation in questionnaires and the children’s in group work was only undertaken in the second year. The findings of this exercise and the reflections they prompt will be reported in two separate chapters.

This chapter focusses specifically on the mechanics of the fieldwork carried out with youngsters and their parents in the sample and control schools against the background of indigenous *ayllus* explored in Section 6.5 above. An account is given of the sources of qualitative data available as well as the methods, constraints, and processes followed in order to obtain quantitative data. The subsequent analysis and interpretation relied on triangulation between these different types of data. They point to an unexpected overall satisfaction with the fulfilment of basic needs, in spite of factual evidence to the contrary. The same applies to gender equality issues. Affective dimensions are hugely important for young children in particular, in spite of a high level of domestic violence. Critical thinking, education for citizenship and participation obtained mixed results in the questionnaires and were largely ignored in group work, in spite of all rhetoric to the contrary. Similarly, the survey showed that the collective dimensions, whilst an important part of the culture, are not really more dependable here than in any human community. The building blocks of agency – critical thinking, education for citizenship, participation – were functionings that were seemingly being achieved but did not come out in group work as dimensions valued by the youngsters. The same pattern emerged in relation to the development of spirituality and a transcendental capability, an aspect much stressed by FyA. The results of the survey were disappointing compared to the movement’s expectations, but still heartening by comparison with secular schools in the region. A full account of these findings as they apply to the work of FyA locally is given below. Further

reflection on their meaning and implications beyond the organization will be proposed in the next chapter.¹

7.1 Preparing for fieldwork

The overall context of the region and its persisting poverty are outlined in Chapter 6. The 2010 census statistics indicate that 94.6% of the population in Chimborazo live in rural areas. The level of unfulfilled basic needs in rural cantons is among the highest in the country: 95.5% in Guamote, 93.3% in Colta, 87.1% in Alausí, 84.0% in Pallatanga.² Whilst 82.8% of the population now has electricity, 70% have no adequate waste disposal facilities, 85% have no drinking water inside the home and 89% are not connected to a sewage system.³ Child mortality has decreased but remains significant (Section 6.6). This is the background of some of the most disadvantaged children in Ecuador, and the context FyA has chosen for its work of development according to *PP*'s and Medellín's template of integral human

¹ The methodology was agreed with FyA before the surveys started. The findings were communicated to the organization in a post-fieldwork report in April 2018, as agreed at the beginning of the study. They were presented in that report in the same way as in this chapter. No individual – child, parent or staff – was identified. Primary-school data were aggregated and thus not attributable to any particular school in the sample. FyA had given permission to use one of its urban centres in the region as urban control; in this case again, the results of the two primary-age forms were aggregated. The identity of the rural controls was not disclosed.

FyA is well aware of the socio-cultural background of the region and the reality described in the school context analyses. Thus some of the findings, in particular regarding domestic violence and gender discrimination, did not come as a surprise. As regards the secondary-age phase in the sample all-through school, the results of the two age groups surveyed (which showed no difference except regarding safety from violence) were aggregated. Care was taken that no individual participant could be identified.

FyA is giving consideration to the comments concerning the 'shadow of the hacienda'. It was interested in potential new ways of working to encourage participation and the development of critical thinking in particular, and by the possible use of a CA-based tool for measuring impact. It was, however, disappointed by the scores regarding spiritual development, although the positive difference between its own schools and other state schools in that regard are nonetheless encouraging (Figures 8.11 and 8.12).

² Instituto Nacional de Estadística y Censos, 2010, at <http://ecuadorencifras.gob.ec/documentos/web-inec/pobreza/nbi/nbi-fuente-cpv/Tabulados_pobreza_por_NBI.xlsx> [accessed 22.02.19]. Income poverty is defined as an income/person of less than USD 84.79 per month. Extreme poverty is described as an income below USD 47.78/month. (El Comercio, 'La pobreza en Ecuador aumentó en diciembre 2018; datos de 5 ciudades', 16.10.2019, at <<https://www.elcomercio.com/actualidad/pobreza-indice-estadisticas-inec-informe.html>> [accessed 12.10.2019].

³ <[https://www.ecured.cu/Provincia_de_Chimborazo_\(Ecuador\)](https://www.ecured.cu/Provincia_de_Chimborazo_(Ecuador))> and <<http://www.chimborazo.gob.ec/chimborazo/?p=349>> [accessed 02.12.2019].

development. All schools in the sample as well as the rural primary control serve at least one *ayllu*; the all-through school (ages 5 to 19) serves five. The intake of the rural schools in the study, both sample and primary-age control, is entirely indigenous. The socio-economic background is that of the *ayllu* as described in Section 6.5 above. In FyA's urban control school there are also a significant number of mestizo students.

In such a setting the task of evaluating the long-term impact of an NGO on the development of children and their communities is a complex one. The features of integral human development as envisioned by CST comprise individual, collective and transcendental elements. Apart from basic necessities (life, health, food, shelter and a right to education) this also involves affective/relational aspects (family and friends), development of critical reasoning and agency, opportunity for participation, religious and political freedom, and the freedom to practise one's religion/values and develop spirituality and faith. The focus was on FyA's role and effectiveness in developing these aspects and expanding the range of opportunities to which children should be entitled.

The reasons for choosing a contextualized adaptation of capability-based studies to measure the children's achieved functionings and FyA's role in this were threefold. The first reason is that studies concentrating on child poverty naturally place the children at the centre of the development agenda, focussing on ends rather than means. The process also helps children reflect on their situation and aspirations. This provided an ideal model for the field studies. The second advantage of a capability-based method is its flexibility. It can be adapted according to the focus of any research: in this case, an organization's effectiveness in integral human development including transcendence. The third reason is that this method makes it possible to obtain valuable quantitative data for use alongside the array of available qualitative information. This makes for a more nuanced and accurate evaluation and, in the context of micro-studies such as this, the method can pinpoint more precisely areas of inequality and injustice, thus highlight areas for future development. The focus of the questionnaires here is, inevitably for a one-off study, on the functionings achieved by the youngsters and supported or otherwise by the school. By contrast,

the group work highlights those aspects which they value most and thus ‘can achieve through choice’.⁴ capabilities.

7.2 The schools in the study

7.2.1 Selection of sample and controls

The main sample consisted of the three Fe y Alegría schools located in central Chimborazo. Two are primary-age schools catering for children up to 12+. The third is an all-through school (5-17+). This sample thus provided access to the full school age range.

In order to test for any idiosyncrasy in the sample, controls were chosen across the same age range but in two different settings. Two state-run institutions in the region (one primary-age, one secondary-age) were chosen as rural controls in order to evaluate similarities and differences with FyA in a rural environment. The rural primary was a small bilingual school, the secondary a college teaching only in Spanish. Differences between FyA’s impact in town and in the country were explored by surveying a FyA school (5–14+) in an urban setting as a control. No state-run secular urban school was available for the study.

7.2.2 The main sample

All three FyA schools in the sample were designated as intercultural bilingual centres (CECIB or *Centro Educativo Comunitario Intercultural Bilingüe*) serving indigenous communities which derive the major part of their income from agricultural activities. Some families also qualify for state benefits. All children in these schools receive grants to pay for expenses associated with schooling, although families may be asked to make a contribution for miscellaneous items. One of the schools is located within two miles of a small market town, while the other two are geographically more isolated – in

⁴ Sen, *Commodities*, p. 18 (see Section 4.2 above).

one case a fifty-minute drive from each of two market towns in the region, with virtually no public transport. The intake of two of these schools is almost totally Catholic, whereas the third includes a significant number of evangelical families.

The secondary-age sample is part of one of the most isolated CECIBs. It serves five communities and has grown in the last five years to offer the bachillerato – the baccalaureate taken at 17+. Local teenagers can thus complete their education locally. This is an important development in view of the existence of child work/trafficking mentioned in 6.5 above, which is still extant in the region. In this sense, the very fact that FyA offers education locally across the whole age range is an important contribution to social transformation and the expansion of opportunities, especially for young women.

7.2.3 The controls

The primary rural control serves an isolated rural community very similar to those of the sample schools. It also includes a significant number of evangelical families. The secondary rural control, which is not bilingual, is located in a small market town, with the vast majority of pupils travelling daily from outlying communities, some times over long distances. As regards the urban control, FyA describes this as ‘semi-urban’ in view of the large numbers of children from indigenous communities that attend it. However, it is not a bilingual school and the fact that it provides education to an ethnically mixed population in an urban setting makes it very different from the rural schools in the sample. The school was in the process of expanding its secondary phase and the older children at the time of the study were 14+.

Schools	FyA	Age range	Inter-cultural bilingual centre	Indigenous intake	Alt. (m) *	Distance from nearest market town	% of children receiving subsidies
Sample primaries	Yes	5-12+	Yes	100%	1800-3900	10-50 min. drive	All (100% fees)
Sample secondary	Yes	13-17+	Yes	100%	Do.	Do.	All (100% fees)
Urban control (primary)	Yes	5-12+	No	50%		N/A	Not known ⁵
Urban control (secondary)	Yes	13-14+	No	50%		N/A	Not known
Rural control (primary)	No	5-12+	Yes	100%	3900	45 min. drive	N/A
Rural control (secondary)	No	13-17+	No	90%	3000+	N/A	N/A

*Figure 7.2 Main characteristics of the schools in the study (for the all-through school in the sample, the primary and secondary phase are listed here separately. * Altitude of urban controls not indicated for anonymisation purposes.*

7.3 The process

7.3.1 Qualitative sources of evidence

As well as participant observation three sources of material were used for triangulation, as follows.

⁵ All Ecuadorian education centres charging fees must spend at least 5% of their fee income in providing grants for youngsters in need (Education Law 1984, Article 173).

- *Documents*: these included national and provincial census documents and statistics. In addition, both FyA Ecuador and FIFYA produce regular updates detailing their philosophical and pedagogical principles. At local level, each school also produces its own context analysis annually (see below).
- *Context analyses*: every FyA centre is expected to carry out a context analysis at the beginning of each school year with the object of ensuring that the education it provides is fully contextualized – an important part of FyA’s philosophy – and that it works effectively with the local community. The reports are prepared largely by the individual school communities, and the presentation and the quality of numerical data analysis as well as its interpretation can vary. Nonetheless, the interconnection between the information they provide and the data gleaned from questionnaires and group work allowed triangulation of qualitative as well as quantitative material.
- *Children’s and parents’ participation*: this took place in two phases. In the first phase, the views of the children and their parents were surveyed by means of two questionnaires. The first questionnaire related to various ‘beings’ and ‘doings’ (individual, collective and spiritual) and asked to what extent the respondents thought that they (or they and their children, in the case of parents) had achieved these aspects. The second questionnaire focussed on the role of the school in facilitating this. In a second phase, the youngsters were asked to work in gender-selective groups to choose and rank the twelve aspects that they valued most.
- *Researcher’s participant observation*: during nineteen months of fieldwork the researcher taught English weekly or twice a week in two of the sample schools, and intermittently in the third. She also taught the primary-age group for a number of weeks both in the rural and the urban control school. This involved informal interaction and conversations with children, staff and to some extent parents on a regular basis.



Figure 7.3 Ayllu (3900 m). Children as young as 5 walk up to one hour to and from school every day. Dustbin bags are worn as protection from the rain.

7.3.2 Procedure

Before the research could begin the project had to be approved by FyA's authorities, whose support was crucial to the success of the venture.

Discussions took at both local and national level, bearing on the purpose of the research and the methodology proposed. Once FyA had formally approved the project, an introductory letter to all parents was drafted by the researcher and vetted by FyA. It was FyA's suggestion that the project should be presented not as 'research' – which might have provoked distrust and negative reactions – but, quite accurately, as an evaluation of FyA following the recent publication of *Horizonte Pedagógico-pastoral*, its new pastoral and pedagogical approach. The letter, distributed to parents via the schools, did indeed help reassure participants that they themselves were not the subjects

of the study. However, it also made it important for the researcher to stress her independence from FyA as well as reassuring participants as to the confidentiality of responses.

Each school then convened a question-and-answer session, in two cases as part of a regular parents/teachers meeting, for the project to be explained again to parents face to face. Parents, children and staff were told again that participation was not mandatory and that all participants were free to withdraw at any stage of the process. Parents seemed satisfied that the research was aimed at evaluating the organization rather than themselves or their communities and that no intrusive questions would be asked. The only questions participants asked in these sessions related to the eventual use of the data.

The study was carried out entirely on school premises. However, as regards participation both the schools' and the parents' attitude highlighted a divergence between the expectations of the researcher and the cultural mindset of the participants. This derived from two unconnected set of obligations – legal, ethical and safeguarding issues on the one hand vs. a moral duty of reciprocity on the other. The disconnection between the two is explored further below in connection with the reactivity to the researcher's role.

7.3.3 The questionnaires

(see Appendix 2)

Youngsters filled in their questionnaires in their classrooms. All (including parents' questionnaires) were anonymous, although children were asked to give their age and gender. Parents also filled in the questionnaires on school premises, usually on the same day as their children. Only in the case of the urban control were the questionnaires sent out via the children and returned (more or less) the next day.

The youngsters were asked to what extent they thought that they themselves had already achieved the feature concerned on a scale ranging from ‘not at all’ to ‘a little’, ‘more or less’ (which people locally rephrased as ‘normal’), ‘a lot’, and ‘totally’.⁶ They were given the possibility of adding their own preferred categories if they wished. A few did so. The second questionnaire followed the same design but asked participants this time to assess to what extent the school helped them achieve the various aspects. Again, space was provided for individual comments if required.

The parents’ questionnaires followed the same model, also with space provided for personal comments. This was not always used but did provide some valuable insights. A few mothers, eager to please but whose level of literacy or Spanish fluency made them request help to complete the questionnaire, often offered informal oral comments that provided valuable insight.⁷

In the three primary schools of the sample, the questionnaires were distributed to all children in Grades 6 and 7 (ages 8–11) and filled in by all except one child who opted not to participate. This gave a sample of eight to twelve children in each school (see Figure 8.4). The same applied in the rural primary control, where all sixteen children completed the questionnaires. In the urban primary control, where numbers were much higher, questionnaires were distributed to children in Grade 7 only (a total of fifty-five children).

⁶ Biggeri and Libanora’s study first required that the children should first determine whether the aspects listed were important for children of their own age generally (see Section 5.6 above). The same was done in this study, but most participants did not find particularly interesting and often ignored it.

⁷ For example, on several occasions mothers asked about freedom from violence burst out ‘As if!’ or ‘If only! Not in *my* life!’. The exercise, answering the questions on a one-to-one basis, brought a degree of collaboration which was not present in the more formal filling in of the questionnaires. It was moving that these mothers considered that their children, at least, were largely free from the violence they themselves endured – a result sometimes, but not always, corroborated by the children’s own answers.

Schools	Age range	Grade	Children per school	Participation		Total Number of children
				Children	Parents	
Primary sample	9-11+	6 and 7	8 to 16	All (-1)	75%	30*
Secondary sample	13-15+	9 and 10	12	All	40%	Aggregated: 24*
	16+	Bach. 3	12	All	40%	
Urban primary control	10-11+	7 only	63	All	63%	55
Urban secondary control	13-14+	9	19	All	63%	12
Rural primary control	9-12	6 and 7	15	All	100%	15
Rural secondary control	13-14+	9	26	All	---	Aggregated: 52*
	16+	Bach. 3	26	All	---	

Figure 7.4 Participants in the questionnaire and group work exercises (one child refused to take part in the questionnaire but was a pro-active participant in the group work).

* These groups were aggregated both because of the small numbers involved and because data showed no significant differences between the lower and later teen groups concerned.

At secondary level, the age groups chosen were Grade 10 (age 14+) and *Bachillerato 3* (third year of Baccalaureate, age 16+). In the urban control the youngsters taking part were Grade 9 (age 13-14+), the highest grade currently taught by the school.

7.3.4 Group work

For the second phase of the exercise the youngsters worked in gender-specific groups to discuss their preferred dimensions. The format was similar

to that used in FyA's pastoral sessions of reflection for primary-age children. The process was as follows.

- discuss with the children what aspects of their lives they value most e.g. health, love, participation, solidarity etc.;
- ask them to discuss these together to provide a ranking;
- ask them to explain, if possible, how their school helps them achieve these aspects, an exercises also used by FyA in pastoral sessions.)

7.3.5 Response rate

No parent in any school objected to their child/ren participating. Only one child refused to answer the questionnaires but later opted to take part in the group work. As regards parent participation, in two of the three sample schools and in the rural control, the parents of *all* children in the relevant grades opted to collaborate. In the third school only 50% of parents (7 out of 14) attended the session tagged on to a regular parents/teachers meeting, this being, apparently, a 'normal' rate of attendance. In the urban control 80 questionnaires were sent out to parents and the return rate of completed questionnaires (62.7%) was good. Only in the case of the secondary rural control did the few parents attending a parents/teachers meeting feel unable to participate at all. The FyA connection was not relevant in their case, the purpose of the research therefore less clear to them. They also found the questions difficult to answer.

They had, however, no objections to their children participating. There was a very clear difference in the average level of cognitive skills between the parents and their offspring in this particular case, which to some extent was also perceptible in other institutions. This points to the impact of education but also highlights the ensuing gap between generations which is likely to have cultural repercussions.

7.3.6 Data analysis

Excel tools were used to support data analysis and the visual representation of quantitative data. In the case of questionnaires results are reported as percentages and indicate the levels of functionings – ‘beings’ and ‘doings’ – which the youngsters and/or their parents felt had been achieved and the extent to which the school was perceived to be promoting this. The results of group work are mean scores of ranking. They relate to a prioritization of the dimensions which the youngsters valued and would, therefore, be likely to seek opportunities to develop: in other words, capabilities. In terms of comparison between sample and control schools four variables were considered:

1. age (primary- vs. secondary-age groups),
2. gender (male vs. female),
3. type of institution (FyA vs. state-run non-faith schools),
4. location (rural vs. urban).

The combination of qualitative and quantitative data, supported by background knowledge of the context and existing documentation, allowed adequate triangulation. Any mismatch between various sources, and in particular between qualitative and quantitative data obtained locally, points to issues for further exploration.

7.4 Methodological constraints

7.4.1 Size and composition of the sample

All the rural schools studied were small or very small. The primary schools of the sample had between six and twelve children aged 9-12 each. Consequently, whilst the outcomes represent in each case the totality of the children of that age group in the school concerned, the results have been aggregated into one ‘primary sample’ category (30 children). The primary rural control comprised all seventeen children aged 9–12, the urban one 63

children of whom 55 participated. At secondary age the sample comprised 24 youngsters – the totality of the school population for the age groups concerned – the urban control 12 (again, the complete relevant age group in that school) and the rural control 48. The law on compulsory enrolment has had an impact and the numbers of male and female students enrolled was more or less equal in all schools, depending on the local demographics.

The researcher is not aware of any youngster with disability in the age groups studied. FyA conducted campaigns for inclusion in 2016–17 and has at least one centre specializing in education for children with special needs.⁸ There were no students with physical disabilities attending any of the schools concerned. Consequently it has not been possible to explore the potential impact of FyA's approach in the situations studied here. A few children undoubtedly had learning difficulties. FyA in this case would follow the standard Ecuadorian answer to non-performance, whereby a child who does not reach the required academic standards is automatically made to repeat the year.

The numbers participating in the study were low but represent the totality of the relevant age groups in the schools in the study. Thus in combination with the qualitative data, the findings give a representative picture of the state of affairs at the time of the study. It is appreciated, however, that the low numbers involved would make any generalisation more difficult.

7.4.2 The researcher's role and reactivity

Ecuadorian highlanders are known for their distrust of outsiders. Thus any stranger trying to pursue research is likely to meet with a great deal of diffidence and cannot be sure to obtain meaningful answers. This is particularly, if not exclusively, true of foreign researchers whose ultimate agenda is not fully understood.

⁸ In Ecuador the all-through Fe y Alegría Education Centre in Santo Domingo de los Tsachilas specialises in particular in the education of children with hearing difficulties.

Long familiarity can override this at least enough to carry out a meaningful study, and to a large extent that has been the case within this study. The researcher was regularly involved in two of the three sample schools for almost two years, intermittently in the third. The first year was spent exclusively teaching and taking part, as a trainee, in FyA's teacher training.⁹ Thus although both FyA and the school staff were informed of the research project from the start and parents were also made aware by the school authorities, the 'research' aspect did not come into play in the first year. By the second year the researcher was perceived as a known quantity. Curiosity about foreign ways and culture remained intense, but the underlying research agenda was accepted as little more than an oddity. What seemed to matter most to parents and staff was how long the researcher would be able to continue English classes, and to children, how many English-language 'educational' videos they would be allowed to watch in class.¹⁰ There is no doubt, however, that such goodwill is 'under review' at all times. Implementing the survey would also have been impossible without FyA's endorsement.

7.4.3 Understanding of questions and the researcher's interpretation

It is never possible to ascertain how any individual participant interprets a given question or term. This applies to both the parents and the children in this survey. The cultural context inevitably comes into play, regardless of the phrasing or the labelling of individual categories. For the children, perceptions will be influenced by their cognitive and emotional development as well as their particular cultural framework. For example, informal comments both at the time of the survey and during the fieldwork period

⁹ FyA expects all who teach in its centres to take part both in the training it offers and in that offered by the provincial Education Authority.

¹⁰ Experience of teaching English in this setting confirmed Freire's theory that learners will learn best through material already familiar to them, e.g. any material involving animals. This, sadly, bore little relation to the English curriculum which was based on the experiences and vocabulary necessary for middle-class urban children. This produced much confusion and a sense of alienation among indigenous pupils in rural schools.

more generally show that they – and often their parents – perceive the school as an all-powerful entity that can cater for all their needs. This is



Figure 7.5 School playground, Chimborazo.

illustrated in particular by their responses to basic-needs questions, as illustrated below in the section on findings.

A researcher's own assumptions will also inevitably colour the interpretation of results. However, in this case in-depth knowledge of the institutions studied as well as the wider background make a meaningful evaluation of the responses easier.

7.4.4 Participation in the study and potential bias

As regards parents' participation, the perception of a duty of reciprocity made an unexpected difference in the case of the sample and the rural primary. This was due to the fact that, by accepting regular teaching duties in these schools, the researcher unwittingly set in motion a different dynamic. Acceptance by enthusiastic children eager to learn (and watch videos) was undoubtedly a positive factor. So was the parents' appreciation of an enhancement to their children's education. This state of affairs triggered the sense of reciprocity so important in Andean culture. In the parents' perception, taking part in the survey became a moral obligation, a way to show gratitude. The same dynamic also applied in the rural primary control.¹¹ Even though the process was evidently intimidating for some, and illiterate mothers required help in filling in the questionnaires,¹² there was a general determination to take part. There was also, certainly for the women, a sense of mixed pride and pleasure that their personal opinion should be sought and valued. In this context, the researcher's assurance that parents and their children had a legal right not to participate and could withdraw at any time, whilst clearly stated, had little meaning: their perceived moral obligation to reciprocate a 'favour' received easily trumped their legal right.

This naturally raises the question of whether the participants, be they parents or children, would express what they really thought or whether they would adapt their answers as a function of what they thought might be expected. There may have been a fear of being disloyal to the school or to FyA, which is perceived as providing for them. Indeed, it is possible that some headteachers may have warned the parents not to 'fail' their school. For their part, some parents may have been reluctant to be totally open. This difficulty

¹¹ This did not apply in the urban controls or in the rural secondary control, located in a small market town: there the researcher's involvement was shorter and contact with parents minimal.

¹² This was offered in the form of the researcher explaining the meaning of a question and noting down the answer, as well as the participants' off-the-cuff comments, often very much to the point. This exercise often gave a 'feel' for the situation that box-ticking in a questionnaire could not provide.

was illustrated in one school where some of the parents' (very frank) answers were accidentally seen by a teacher who unexpectedly walked into the room. Their negative responses were later queried by the school authorities and they were berated for potentially giving a poor impression of the school. Nonetheless, their readiness to give a truthful opinion was encouraging.

Thus loyalty to the school may have caused a higher than expected number of 'good' and 'excellent' answers in the questionnaires. This result, however, can also be explained by another factor that definitely came into



Figure 7.6 A typical rural school, Chimborazo. School buildings throughout the province were upgraded after the government provided emergency funding following the 2016 earthquake.

play: adaptive preferences. Adaptive preferences are also in evidence in the schools' context analyses made available to the researcher,¹³ with parents sometimes judging education in their school as 'good' even where the headteacher had identified significant inadequacies in teaching and learning. Adaptation here may be partly due to the parents' personal experience of how things used to be, which results in low expectations. In a number of cases their answers to the questionnaires also showed adaptive preferences relating in particular to basic needs, gender equality and domestic violence.

These factors in themselves do not mean that the results have no validity. Questionnaires are a valuable tool, but the outcomes need to be interpreted alongside other evidence. The comparison of parents' and children's responses already gives some indication. The group work on identifying preferred dimensions, with the youngsters sometimes using their own vocabulary to express their preferences, also provides valuable information. Against the socio-historical and educational background of the schools, the results of the survey combine with context analyses, relevant statistics and personal observation to build a reliable image of the youngsters and their communities.

7.5 Findings

The main aim of the research was to study the effectiveness of FyA schools in promoting integral human development and social transformation according to an Ignatian tradition in a challenging socio-economic situation. Consequently, the results reported here focus on the outcomes of both questionnaires and group work, and on the issues they highlight. The results of the questionnaires bear both on the extent to which youngsters consider they have achieved the aspects identified, and on how much they believe their institution has helped them in the process. The parents' own perceptions of how far they think they and their children have achieved

¹³ Only one school refused to share its context analysis, nor was it made available to FyA. This happened to be the school where the parents gave particular negative opinions in the questionnaires.

particular aspects of development and the role of the school in this process are also used for comparison/triangulation. In group work, the dimensions prioritized by the children themselves identify aspects which they really value, the capabilities which they are thus likely at least to attempt to develop. This provides a different, more spontaneous picture of the extent to which FyA has succeeded in inculcating in its pupils a sense of the importance of particular dimensions. It also gives an insight into the likely development of the capabilities concerned in the future.

As a first, very clear result, the combination of questionnaires and group work revealed high scores of functioning achievement for basic needs and affective dimensions, the latter in particular for primary-age children. These findings coincided with the dimensions highlighted by the schools' context analyses available, where health and family were listed as the aspects most valued by the communities. Beyond this, four main areas emerged. In the questionnaires the highest positive scores related to education and collective capabilities. By contrast there were a significant number of negative scores relating to bodily integrity/safety from violence including, in one sample school, from primary-age children; the school's context analysis confirmed this finding. The girls' sense of physical safety also appeared to decrease with age. Mixed responses were obtained for critical thinking and citizenship education, and for participation. The responses on participation and age-related capability, displayed a definite difference between genders (see Figure 8.7). The results concerning spiritual and Christian leadership were also mixed and generally lower than expected, although comparison with the state-run controls gives a much more positive picture. Finally, the researcher's participant observation in the sample schools also highlighted gender inequality as a major issue, but not one always fully perceived as such by parents or children – or indeed staff – due to cultural conditioning.

7.5.1 Basic needs

Basic needs received high scores, both in the questionnaires and in group work (see Figure 8.8). This did not always apply to 'life' – the first item on the list – inasmuch as children sometimes take 'life' or 'right to life' for

granted in regions not affected by war. Life, however, did get significant scores as being supported by the school: ‘the school helps with life’, explained one youngster, ‘by telling us how and why we have a right to life.’

Functioning/potentiality	Perceived functioning achievement	Perception of school’s role
Health	Yes	Important
Nutrition/shelter	Mostly	Mixed
Affective dimensions	Yes	Mixed
Collective dimensions: solidarity/reciprocity/Sumak Kawsay	Yes (youngsters) Responses surprisingly mixed from parents	Mixed
Participation	Yes for males, poor for girls	Yes for males
Bodily integrity/safety from violence	Variable with some very poor scores (both primary and secondary) across both samples and controls	Variable
Citizenship education	Variable (higher for boys)	Yes
Spirituality/practice of values/Christian leadership	Mixed especially at secondary age	Primary: mixed Secondary: mostly negative except for tiny minority opting for the pastoral CEFA programme

Figure 7.7 Summary of main findings from the questionnaires in the sample schools (children’s surveys).

Health was, universally, the highest scorer both in the children’s questionnaires as a dimension already achieved and also supported by the school. It was also identified as all-essential in the parents’ questionnaires and in the schools’ context analyses. Health, nourishment and shelter, the basic underpinning necessary ‘to avoid deprivation’ and expand other

opportunities and freedoms, were something that the majority of children both valued and, in the majority of cases, felt they had achieved, with the occasional exception of shelter in isolated rural areas. It was also the parents' perception in all but one school that they, and their children, had fully achieved these dimensions. Parents across the board also considered that their children enjoyed these aspects to a higher degree than themselves, health in particular, the difference being parent and child being on average approximately 10–15%.

This is a somewhat surprising finding, in view of the fact that official statistics highlight this region as the poorest in the country in terms of unsatisfied basic needs (see Section 8.1). Against this background, the responses given by both children and parents can be explained in two ways. The first, as noted, is that they indicate a substantial level of adaptive preferences. Whilst context analyses indicate that many families have either their own house or at least adequate shelter, their surprisingly positive outlook could be due to the memory of the dismal conditions prevalent thirty or forty years ago.¹⁴ Another explanation is that the broad categories used in questionnaires of this sort do not reveal degrees of quality. There is, for example, a great deal of difference between not starving and enjoying a healthy diet. Further delving into each category would be needed to establish a full picture. In establishing this sort of database NGOs, faith-based or not, can make a huge difference.

In terms of this role of organizations, a significant feature in relation to basic needs is the extent to which youngsters, even at a young age, perceived their institution as being the entity that enables them to fulfil these needs. This was highlighted both in additional comments in the questionnaires and in informal

¹⁴ It should also be borne in mind that disease in Andean culture is not seen necessarily as a result of poor conditions or defective health and safety precautions, but as a manifestation of 'the will of God'.

discussions afterwards. Sometimes this assessment was realistic from a child's viewpoint. For example, commenting on health one child explained: 'if we are sick, the teacher will look after us and may take us to the hospital'; or in the case of food: 'yes, the school helps because in the canteen we're *given* something to eat' (researcher's italics), despite the fact that the food supplied in the canteen has to be bought. The difference between the milk and cereal bars provided by the state but distributed by the school is beyond a young child's understanding. But to what extent the line is also blurred in their parents' minds is a moot point, with cultural implications in terms of the perception of FyA's role. However, the extent to which the school was perceived as facilitator differed according to the school concerned.

7.5.2 Affective dimensions

Affective dimensions were also very high scorers in the questionnaires, especially in primary schools, both as something most younger children believed to be important and something they already enjoyed. In this respect children displayed a sense of affective 'agency' from a young age. To the questionnaire category 'love of family and friends', children in the sample schools in particular added 'love *for* family', 'being affectionate', 'being a good friend' and 'friendship', the latter being perceived as a separate feature from family love.

There was no significant difference between the FyA teenage samples and the controls as regards affective dimensions. They scored high in all schools with one exception: the rural primary control, where they were totally absent in the group work of males and low-ranking in the female group – a finding which would in itself warrant further exploration. Affective aspects, however, tended to rank lower everywhere with adolescents, especially males.

7.5.3 Education

Education received high scores from both genders in all schools surveyed as a dimension they believed they were achieving ‘well’ or ‘totally’ (from 62% to 88% in the secondary-age sample) and which, naturally, was supported by the school. In group work, it was ranked particularly highly by younger girls everywhere with, surprisingly, an exceptionally high score in the primary rural control (11/12 for boys and 12/12 for girls). At that age there was little difference in the scores given by FyA vs. control schools, or between urban

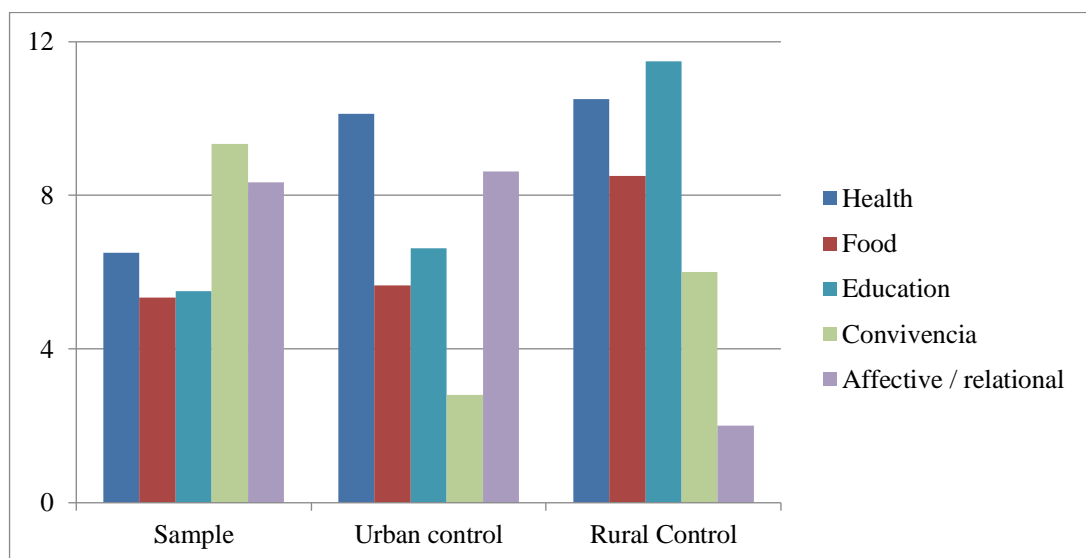


Figure 7.8 Priorities identified by primary school children's in group work (maximum score of 12).

and rural settings. Parents' questionnaires also ranked education very highly as something their children were achieving and, in most cases, to a greater or much greater extent than themselves.¹⁵

¹⁵ The Spanish word *hijos* can refer either to ‘sons’ or to all offspring without gender distinction. When parents say they value education for *mis hijos* it is thus impossible to say whether they are referring only to their sons or whether this applies to daughters as well. Asking this question is not always possible.

However, a gender gap seems to appear in questionnaires as the youngsters get older. In group work, girls in the secondary urban control gave education a score 25% lower than their male counterparts (6/12 vs. 9/12). The lowest score in the whole survey was recorded among the females aged 16–20 in the rural secondary control, at half that of their male counterparts (3/12 vs. 6/12). This is considerably lower than in any of the FyA groups of the same age. It points to academic aspirations among teenage girls remaining limited in both urban and rural settings, especially the latter. Yet it seems that this does not – or not yet – affect their younger sisters. It may be that the legal requirement for universal education in recent years is having an impact on expectations. The younger girls’ high ranking of education as an important functioning which they felt they were achieving may indicate a growing awareness of the importance of education in both individual and social transformation – something also reflected in the parents’ answers. Against the background of gender relations described above, it is possible that it also reflects a slight shift in the attitude to educating girls, which may in time impact on gender equality. Only time will tell whether the girls’ high hopes and expectations are realistic in practice.

7.5.4 Safety from violence

In the FyA primary school sample, questionnaires reveal a degree of uneasiness regarding safety from violence. This was particularly high in two of the schools. In the first, where 80% of boys and 70% of girls felt they enjoyed little or no safety from violence, the context analysis also indicated a high incidence of domestic violence generally. And in the rural all-through school of the sample problems for girls appeared to increase with age: 100% of girls felt totally safe at primary-school age, against 83% in the 13–15 group and only 33% by age 16+. By contrast the boys in the same school claimed to enjoy total safety across the age range. Issues were not limited to rural communities, however. In the secondary urban control, the questionnaires indicated that only 50% of youngsters of either sex claimed to feel safe from violence. Whilst figures in the rural school above raise the

possibility of sexual harassment and abuse of girls increasing with age, other factors would also apply in urban settings: as youngsters become more independent they also become more vulnerable to both petty and violent crime which is common in the city.

On the basis of the questionnaires, an average of one child in five in the survey did not feel safe from violence. This is a high figure. The parents' questionnaires and school context analyses tended to support this finding. Sadly, in many cases, the mothers' own scores indicated that they considered themselves at as great a risk of violence as their children or greater.¹⁶

The group work, however, shows a slightly different perspective. The lack of safety was highlighted by students in the sample schools, with an average score of 2.5/12 responses in the primary sample, climbing to 5/12 for secondary students. Figures for the urban control were very similar. The issue was not mentioned at all in the rural controls. The difference in scores between primary- and secondary-age youngsters, females in particular, raises the question of sexual violence. Overall, it raises again the possibility of an adaptive response in a cultural context where domestic violence, although demonstrably present (the rate of femicide in Chimborazo being particularly high) is accepted as the norm. This indicates a serious obstacle to human flourishing.

7.5.5 Social and collective dimensions

These categories are not normally included in capability-based studies of children, such as those by Biggeri and his colleagues reported in Chapter 5. They were based on the generic concept of Buen Vivir/Sumak Kawsay and presented both as such but also broken down into its components: solidarity,

¹⁶ It has not been possible to differentiate between genders in the parents' questionnaires, for two reasons. Firstly, a large number of questionnaires were filled in by mothers and grandmothers, the men being at work during school hours. Secondly, in the urban FyA sample questionnaires were sent out and not all parents indicated their gender.

reciprocity and *convivencia*. *Convivencia* describes peaceful coexistence with others – a highly-praised feature of the traditional *ayllu* and an essential component of Sumak Kawsay. In the sample schools, solidarity and *convivencia* drew high scores across the board as something youngsters both valued and already enjoyed, especially the primary-age children. This, together with affectivity, was the section which gave rise to the most additional dimensions in questionnaires and rephrasing in group work: ‘living in harmony with neighbours’, ‘harmony with friends’, ‘not fighting’, ‘being respectful’ and ‘greeting people’ (a basic courtesy from youngsters towards their elders) were seen as important features already enjoyed by the majority of participants. They were also generally perceived as being supported by the school.

However there was, maybe surprisingly, a definite difference between males and females in this respect. In two of the three schools in the sample, across the age range, males gave higher scores to enjoying these dimensions than their female counterparts – in one case, the female score trailed behind by as much as 53%. This result coincided with relatively poor scores relating to safety. However, females were more likely than their male counterparts to think that the school supported these collective dimensions. These social dimensions, rooted in both Andean culture and in the Christian values of solidarity and reciprocity, are at the root of ‘a growing awareness of other people’s dignity, [...] an active interest in the common good, and a desire for peace’¹⁷ understood, accepted and applied by children from an early age. In several schools, for example, youngsters commented that solidarity was about ‘helping those most in need’. FyA is very pro-active in promoting these values, although this may not always be fully appreciated by parents in all schools because of FyA being, ultimately, an outsider. Thus in an Andean context, integral human development could not easily be understood outside this deep interconnection between individual development and collective capabilities, which is also a *sine qua non* in a Christian context.

¹⁷ PP 21.

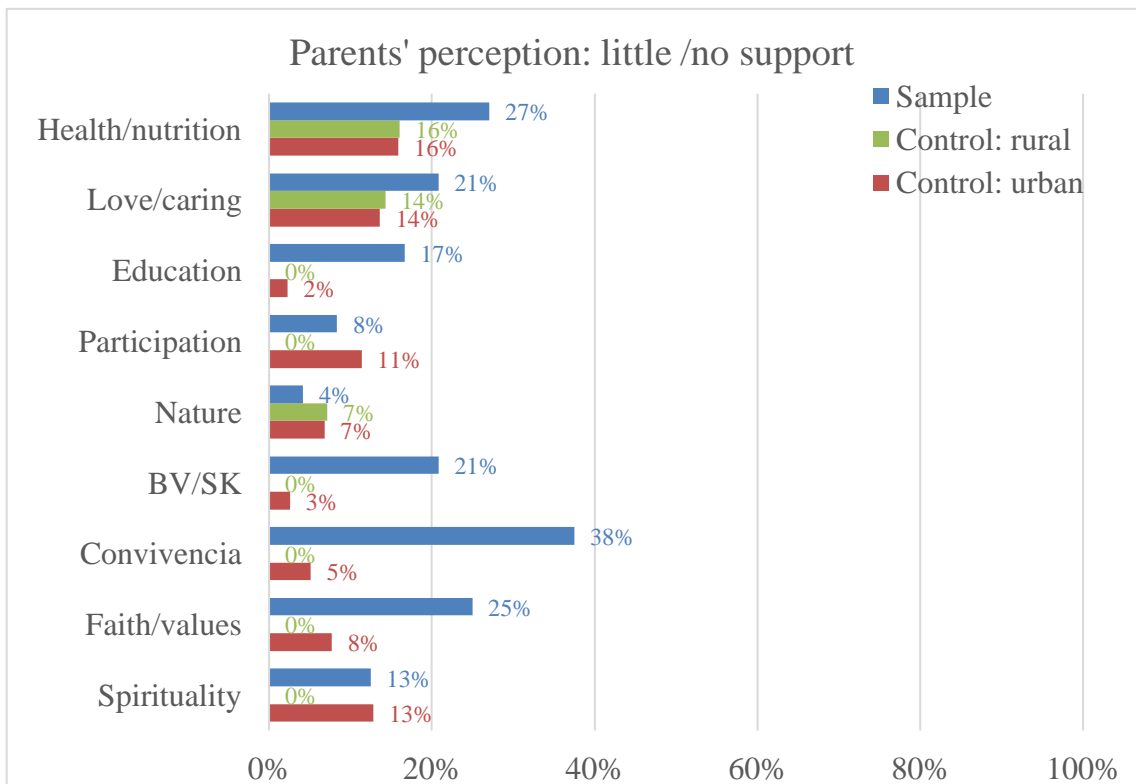
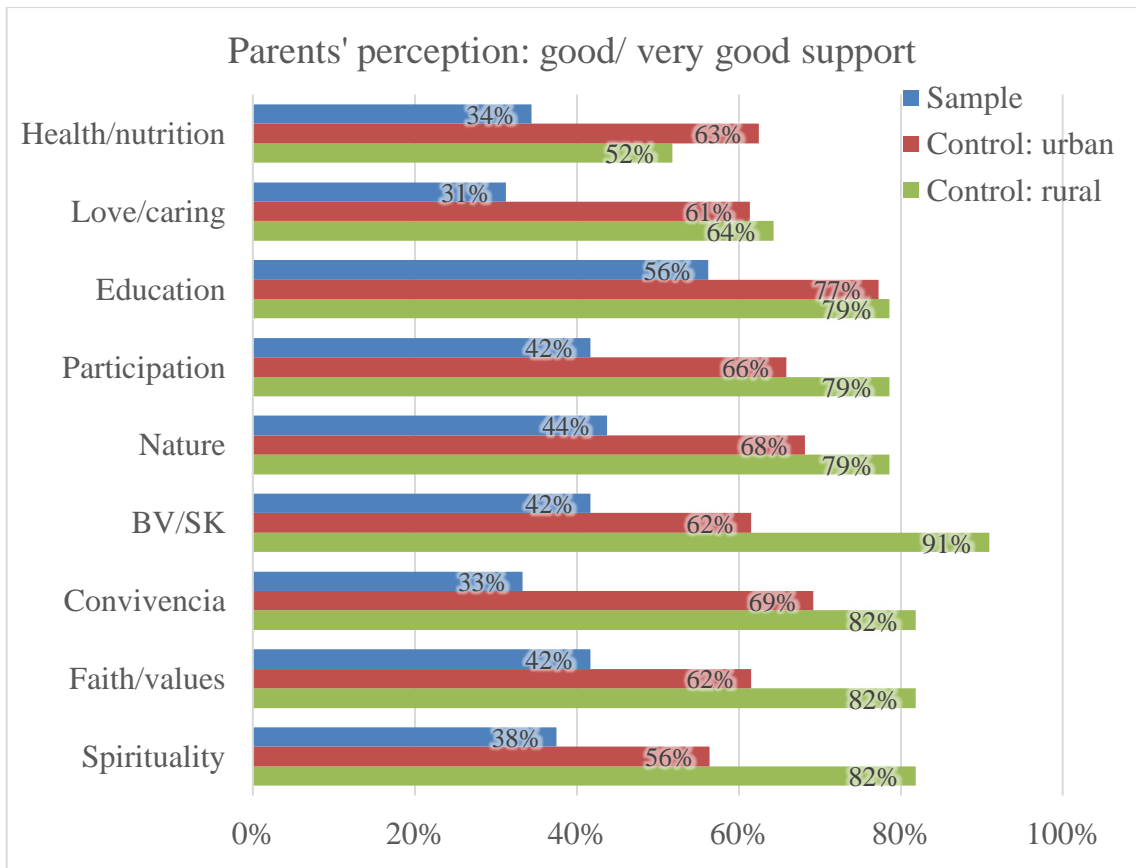


Figure 7.9a and 7.9b Parents' perception of the role of the school in developing their children. The larger number of negative perceptions occurred in the school with the higher number of evangelical families.

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7.5.6 Gender inequality

This is a worldwide issue, also closely related to the issue of violence against women and girls. Consequences range from domestic violence to lack of opportunities and a reduced capability set, and ultimately to feminicide. A high degree of gender inequality was observed in all schools in the context of his study. It has been claimed that the Andean tradition had a much more equalitarian approach, dividing work equally between the sexes; but Hispanic and Church cultures changed all that. Be it as it may, social structures in Chimborazo are highly patriarchal. Regardless of the equal rights guaranteed by the 2008 Constitution, the local saying ‘he may beat you, he may kill you but he’s the husband’ (quoted in one context analysis) still holds sway. The province, as we have seen, has a high rate of feminicide.

The observation of school life confirms the disparity in the treatment of youngsters of different genders. Sexism is ingrained in the culture and applied unconsciously by the teaching staff, both male and female. The phrase *hombres primero* – men first – recurs constantly, from lining up children to file into their classroom, to choosing seats to watch a video (tall boys positioning themselves firmly in front of tiny girls), to describing God’s creation¹⁸ or God’s purpose for men and women. In group work, males did tend to value leadership and participation more than females. This was particularly marked in the school with the highest concerns about violence: there the girls focussed on care for the health of family and children as their most valued ‘beings’ and ‘doings’, whilst the boys aspired to participation and leadership. Displays on school walls also perpetuated stereotypes. In one school, the work of 10- and 11-year-old pupils describing highly traditional male and female roles ended with the bold statement: ‘women were created

¹⁸ A 10-year-old in a Religious Education class asking whether she could write that God created woman as well as man, was told firmly that ‘man’ meant everyone so further mention of woman was not necessary.

to serve men.’ This appears not to have been questioned by the (male) teacher.¹⁹

This cultural acceptance of male superiority as a given naturally limits girls’ opportunities but the issue is masked by a high degree of adaptive preferences. For example, figures show that in some of the communities in this study women on local councils are almost invariably relegated to roles of secretary or (male-supervised) treasurer, whereas men are elected as chair and vice-chair. Yet in the school context analyses these women stated proudly: ‘we have gender equality here.’ As regards women’s education, the researcher’s own experience revealed two extremes: one of a young mother crying bitterly in a meeting because her parents had refused to let her study like her brothers; and by contrast, another explaining how her own mother had tried to push her to attend college, even offering to move the family so that she could do so: ‘but I just wasn’t interested.’ The latter situation does occur: women have not been taught that education is desirable for them. In this sense there is a clear connection between education and redressing gender inequality.

7.5.7 Agency for social transformation

The building blocks of agency for change are defined here as critical thinking, education for citizenship and participation, and also freedom of opinion. These dimensions are an important aspect of both personal development and social transformation. As such they are part of the Ignatian Pedagogical Paradigm (IPP). In Latin America they have largely replaced Freire’s notion of *concientización* as the basic attributes of agents of change. They are particularly important for indigenous populations that have traditionally been excluded from both local and national decision-making. In

¹⁹ The questionnaires showed no significant difference between the sexes in terms of free time/leisure/play. There is not enough evidence to say whether the girls’ responses were the result of an adaptive preference.

a country such as Ecuador, which counts seventeen nationalities and three official languages as well as another ten recognized indigenous languages, they also contribute to building a sense of nationhood. In FyA's vision they are meant to be exercised in connection with the Gospel values and the Christian leadership it aims to form in its schools.

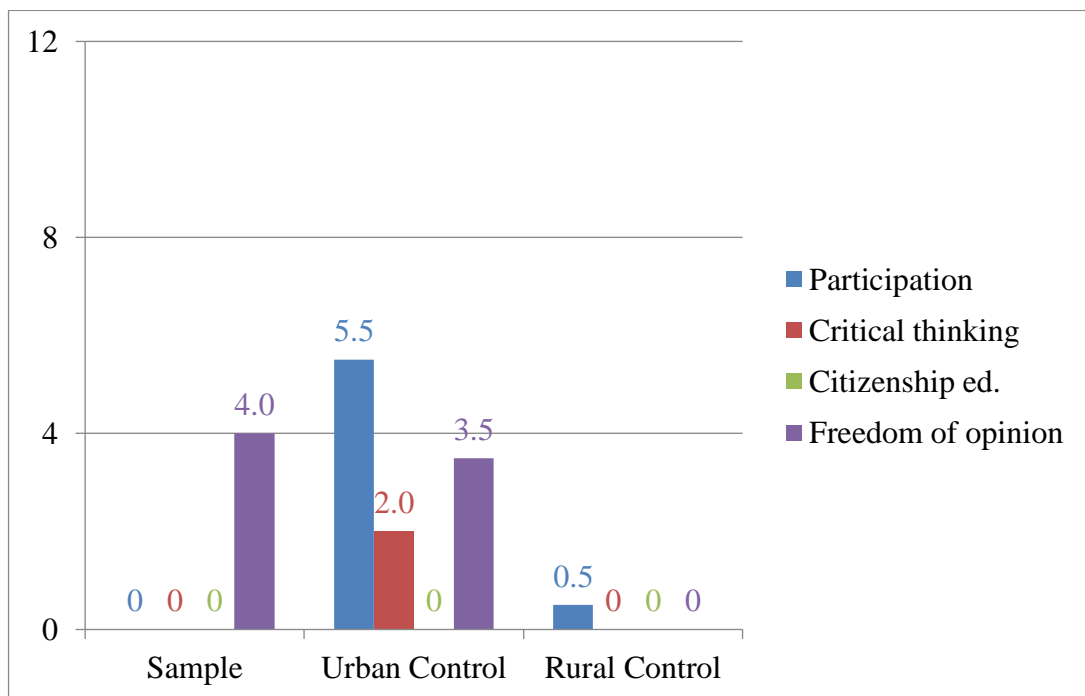


Figure 7.10 Importance of the building blocks of socio-political agency as identified in secondary pupils' group work (maximum score of 12).

According to the results of their questionnaires, parents mostly felt confident that the school was teaching their children these skills (see Figures 8.9a and 8.9b). Responses to the questionnaires given by the secondary-age participants show a mixed response but highlight a gender difference both in terms of achievement and the impact of the school. Males were more likely than females to perceive these as functionings that they had already achieved, and more likely to consider that the school supported them in developing these skills.

However the group work, which highlighted the categories that the youngsters valued most and would therefore be likely to want to develop, gave a different picture. It indicated that these dimensions were considered of

little or no importance by the youngsters (see Figure 8.10). The FyA urban control showed higher awareness of their importance than its rural counterparts. The poor results of the rural control concerning all these aspects is a particular concern. They seem to confirm Tuaza's verdict that basic democratic rights (and by correlation, duties) are not being learnt, or at least that their importance is not being fully recognized. On the face of it, FyA's impact on this state of affairs in rural areas has been minimal. Moreover, the gender difference highlighted in the questionnaires seems to point again to a gender imbalance in the schools' approach to these topics, which does nothing to develop young women's capability to think critically, become educated in their rights and duties as citizens or aspire to participation. This will warrant further reflection in Chapter 9.

7.5.8 Moral values, Christian leadership and spirituality

In view of the many children of all faiths and none that attend its schools and the fact that it is funded by lay states, FyA now prefers to downplay its denominational foundation and to nurture spirituality separately from religion. But it remains faithful to a Christian vision of integral human development and sees fostering youngsters' spirituality and leadership as an essential part of the development of the whole child. It therefore offers a formal, carefully structured pastoral programme for both primary- and secondary-age youngsters to develop these aspects.

MIFA (*Movimiento Infantil Fe y Alegría*) is a compulsory course that trains children aged 8–11 to be 'leaders' by demonstrating integrity, justice, solidarity, tolerance and respect for the environment, secure in the knowledge that their parents and God love them and want their happiness. MIFA-trained leaders are formally commissioned, usually at the age of 8 or 9, at an official school ceremony attended by their parents, when the school community will reflect together on the nature of Christian leadership before the children receive a badge and scarf of office. CEFA (*Campamentos Ecuatorianos Fe y Alegría*) is an optional programme for secondary-age pupils. It describes

itself as a Young Leaders Movement, teaching leadership and promoting agency for transformation. Precisely because it is optional CEFA can proudly display its Christian connection. The *Jesuitas Ecuador* website has a page dedicated to the programme.²⁰ It explains that CEFA members have the opportunity to practise leadership and be the protagonists of their own change. The Latin American Church's method of reflection-action gives CEFA the foundations for transforming the lives of its young members. The spirituality that animates CEFA is oriented to the development of an experience and lifestyle corresponding to Gospel values.

The extent to which MIFA and CEFA are effective, and also perceived by pupils and parents to be effective, should thus be an essential marker of FyA's success in this area. FyA's documentation bears witness to the importance it attaches to developing moral values and spirituality. The time and effort the movement invests in achieving this was also plain to see during the period of fieldwork. The training, and the public rituals that go with it, are highly visible; the vocabulary and concepts used in training are quite consistent.

For this reason the phrasing used in the questionnaires regarding these aspects had been tailored to reflect MIFA so it could be understood across the age range.²¹ The results were disappointing. In the questionnaires, learning and practising moral values were reported as important functionings which the youngsters considered they had achieved. In a region where atheism is still rare, the same applied to the practice of one's faith – including in the secular control schools. But this did not apply to spirituality and Christian leadership. Christian leadership did occasionally appear, especially with the males, but spirituality was never identified as something the youngsters either

²⁰ <<http://www.jesuitas.ec/movimiento-de-liderazgo-juvenil-cefa-campamentos-fe-y-Alegría/>> [accessed 01.12.2019].

²¹ FyA had insisted that the phrasing relating to values and spirituality should not be specifically Christian, other than in connection with the leadership training provided by CEFA. However, in view of the confusion over the label 'Christian' in the Andes, which is commonly applied to 'evangelicals' as opposed to Catholics, this did not prove to be a disadvantage.

valued or believed they had actually achieved (see Figures 7.11 and 7.12). Outcomes in FyA primary schools, both rural and urban, indicate that roughly one child in five thought they did not receive support in this area.

Things are different in secondary schools, where the CEFA course is optional. In the FyA rural secondary sample school, only two or three out of a group of twenty-four youngsters attended the CEFA course. Less than half considered the school helped them achieve spiritual dimensions. The males were particularly disgruntled: 55% of them felt they received little or no help from the school with spirituality, and nearly 75% with Christian leadership.²² In the questionnaires, FyA schools scored no higher in this respect than the secular control. A number of factors may be at play.

One characteristic of the CEFA and MIFA programmes is that, following introduction by FyA pastoral workers, it is left to teachers to implement locally. This inevitably results in a variable quality of implementation. Because the teenage programme is voluntary, a large proportion of youngsters receive no further training from the age of 11. The very few CEFA members in the secondary FyA groups were extremely satisfied with the support of the school for both spirituality and Christian leadership. Nonetheless, on the whole the results in the sample secondary school clearly reflected a significant degree of disenchantment with the school, also replicated in other domains and in parents' responses. Another factor is involved here: there are a sizeable number of evangelical families in that school's catchment area. Not all parents are comfortable with some of the school's practices – dancing or 'drinking', for example – which they see as contrary to Scripture. 'They acquire bad habits here' confided one evangelical mother. In a context where distrust between Christian denominations is still extant, this also raises the issue of what 'Christian leadership' may mean to different denominational groups. It is unlikely that pupils from evangelical backgrounds would choose to attend CEFA or feel

²² The school concerned has a high number of evangelical youngsters, which may explain the result.

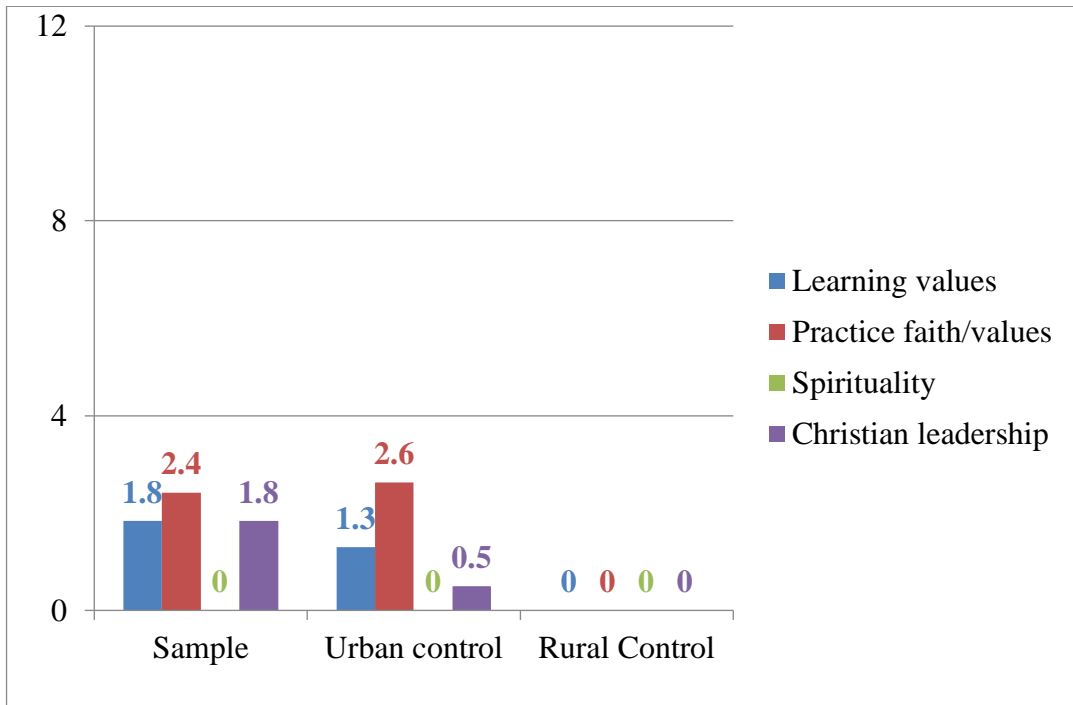


Figure 7.11 Importance of moral and spiritual values in primary-age children as identified in group work (all schools are FyA except the rural control). Maximum score: 12.

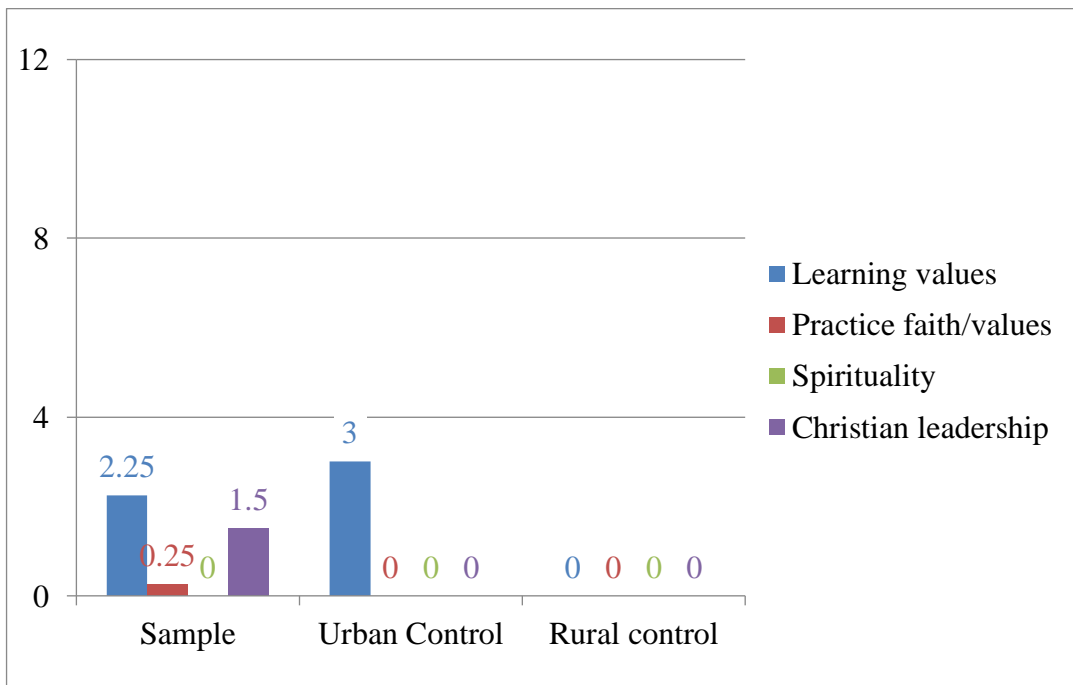


Figure 7.12 Importance of moral and spiritual values in secondary-age schools as identified in group work (all schools are FyA except the rural control). Population characteristics: Catholic, with a significant number of evangelical pupils in one sample school; mixed populations with a high number of Catholics in the FyA urban control; mixed population in the state-run rural controls. Maximum score: 12.

that their particular way of expressing their faith is supported by the school. The distrust works both ways and leads to all-round misunderstandings. ‘No Christian leadership for us’ commented one parent in another school, ‘we are Catholics.’

The relatively low scores given to Christian leadership and spirituality as dimensions either achieved by the pupils or well supported by the school, must thus come as a disappointment to FyA, and the results of the group work would also be disheartening. Primary-age children gave great importance to their religious faith, the females in particular. But this preference declined with age. Christian leadership was only chosen as a valued dimension by very few youngsters, mostly male. Spirituality was absent from the priorities of all groups, whether sample or controls, primary or secondary.

These results of the group work, however, do offer some encouragement for FyA (see Figures 8.11 and 8.12). True, spirituality and Christian leadership scored low. But a comparison between the FyA schools (including the urban control) and the secular state-run controls shows a clear gap between the two groups. In control groups, these dimensions do not appear *at all* in group work. This seems proof that, although outcomes may not be as positive as FyA might wish, the youngsters have undeniably absorbed moral and spiritual values and appreciate the opportunity to practise them. Thus FyA’s work in this area does have an impact. Youngsters are also aware of the possibility of developing their spirituality and Christian leadership and agency, even if they do not see this as a priority. FyA will want to build further on this awareness.

7.6 Conclusion

This micro-study of small schools serving indigenous populations made it possible to focus on a very local ‘frontier’ situation and highlight the deprivations and inequalities in that setting. The capability-based approach used for this study

provided quantitative data to complement the various sources of qualitative data. It helped both to confirm conclusions, but also to highlight aspects which may not have been identified as in need of review: for example, gender inequality and its link to domestic violence, gender imbalance in terms of participation, and the challenging results regarding spirituality and Christian leadership. It also highlighted a high level of adaptive preferences, concerning in particular basic needs, gender equality and the understanding of citizenship. The Sumak Kawsay framework of solidarity and reciprocity and *convivencia* is more important in rural areas than in the town, yet it received mixed scores. The high level of domestic violence and *feminicidio* itself is an indication that these values, whilst important, can be idealized by outsiders.

These conclusions point to a need for further work in terms of IHD. Some of this work, such as providing access to basic necessities – water, health services, sewage and refuse disposal, must fall to the state. But a major concern arising from the survey is the combined lack of interest in critical thinking, citizenship education and participation on the one hand, and Christian leadership on the other. The remit of an education for integral development and social justice is to develop a sense of the importance of the building blocks of agency alongside Gospel values and the aspiration of Christian leadership. These dimensions so far have not been developed in a way that is meaningful to youngsters, even by the end of their school careers; this is a major concern in terms of both personal development and the building of a just society. This conclusion has implications for the local as well as the national context but also beyond. The next chapter offers further reflection on these issues.

Chapter 8. Reflecting on the case study

The aim of integrating the social and education apostolates of the Society of Jesus was to provide praxis for integral development and social transformation. Case studies such as that presented here serve a number of purposes. Through an objective analysis as can be they highlight the inequalities and injustice to be addressed; they point to a contextualized course of action; and, finally, they make possible an evaluation leading to further reflection. Whilst the small samples involved here make generalisation difficult, issues raised even from such a small population can resonate much further afield. Against this background this chapter offers further thoughts on points arising directly from the findings of the case study. Following the pastoral circle methodological framework, they lead to the final stage – reflection on the findings.

Fe y Alegría is a Christian, Ignatian-inspired organization trying to find local solutions to situations of injustice; in other words, implementing Decree Four in education. Focussing on some of the challenges it faces will enable us to evaluate to what extent it is and can continue to be successful in doing so. With this in mind four aspects warrant further reflection.

- The first concerns FyA's *educación popular* as a contextualized integration of the Society's social and education apostolates. Balancing finely its Ignatian roots and Jesuit dependency, does it still deliver Ignatian education, and what is the impact of this in terms of IHD and promoting agency for change?
- The second issue relates to the nature of the socio-cultural context, a crucial factor in supporting or hindering children's development and rights. In Chimborazo FyA has to navigate the legacy of the hacienda – poverty, racial discrimination, gender inequality – that still affects youngsters' life chances. The results of the survey indicate that children may not consider the building blocks of agency as important dimensions for development. Is FyA's offer contextualized enough for a rural indigenous context?
- Alternative curriculum models are explored as a possible answer.

- The fourth, all-important point is FyA's concept of transforming spirituality. Here again, the findings suggest that FyA is not entirely successful either in transmitting a sense of the importance of this dimension or in fostering an openly Christian commitment to action. It is also increasingly reluctant to promote a religious worldview in the classroom. There is a tension here to be addressed, with implications for Jesuit education and beyond.

8.1 FyA as contextualized Ignatian pedagogy

We explored in Chapter 2 the evolution of the apostolate of education and its importance in the Society's understanding of mission. In the words of Peter-Hans Kolvenbach, the aim of Ignatian educators is 'to form men and women of competence, conscience, and compassionate commitment'.¹ For its part FyA Ecuador, in a conference celebrating the fiftieth anniversary of its presence in that country, reminded the audience that from the very beginning the movement has considered education to be 'one of the main sources of human dignity and liberation, and the aim of *educación popular* has been to produce persons of conscience, competence, critical thinking and therefore freedom'.² In this context persons of conscience are understood to be individuals who, 'in addition to knowing themselves, thanks to developing their ability to internalise and cultivate a spiritual life [...] have a significant knowledge and experience of society and its imbalances'.³ The concept of 'conscience' thus includes both the moral dimension of distinguishing right from wrong and socio-political awareness: a true cognate of conscientisation. The aim of a Jesuit education is 'that full growth of the human

¹ Peter-Hans Kolvenbach, quoted in *Ignatian Pedagogy*, 13, p. 241.

² Luis Túpac-Yupanqui, 'La educación popular en el Ecuador de hoy', p. 122. The date discrepancy between Kolvenbach's 'Letter' and this articulation of the early aims of FyA illustrate the latter's awareness of its Ignatian heritage – an awareness made all the keener, perhaps, by the necessity to keep good relations with what *The Characteristics of Jesuit Education* calls 'the Jesuit "system" of schools' (9.2, p. 210). Indeed, the original text of the lecture presented by Túpac-Yupanqui was originally drafted by P. Alaña SJ, who later had to withdraw for health reasons (p. 117).

³ Adolfo Nicolas SJ, quoted in SIPEI: 'Jesuit Education Aims to Human Excellence: Men and Women of Conscience, Competence, Compassion and Commitment', <http://www.sjweb.info/education/doc-news/HUMAN_EXCELLENCE_ENG.pdf> [accessed 10.10.2019].

person that leads to action’,⁴ an action oriented towards promoting justice. In this sense Ignatian *educación popular* corresponds to *educación liberadora*: an education which fosters the agency that will liberate from inhuman conditions.⁵ FyA Ecuador brings together here the visions of José María Vélaz, Paulo Freire and Bishop Proaño of Riobamba: all three in their own way, it claims, believed that education is the way to conscientisation, and therefore social transformation. This is its very *raison d’être*.⁶

Social transformation requires not just education but also the use of advocacy as and where necessary. FyA proudly pursues these two facets of praxis for justice: developing the most vulnerable through education, and robustly challenging injustice wherever it finds it. In a 2016 publication on this subject⁷ FyA Ecuador merges the two aspects, explicitly explaining the Ignatian character of its public action as a direct result of the Ignatian characteristics of all its institutions, namely:

- intentionally seeking God in all things;
- practising Ignatian discernment;
- approaching reality through a careful context analysis, in dialogue with experience, weighing facts reflectively, with a view to action and always open to evaluation.⁸

FyA as an organization sees its advocacy as well as its educational institutions as fitting this description. Consequently, it views its commitment to challenging injustice through public action – *acción pública*, also referred to as *incidencia pública* (lobbying) and *advocacy* (in English) – as being in line with the vision of the Global Ignatian Advocacy Network. Based on Ignatian values, its advocacy is rooted in a close relationship with poor communities and acts in collaboration with civil

⁴ Kolvenbach, quoted in *Ignatian Pedagogy*, 12, p. 240.

⁵ Túpac-Yupanqui, p. 123.

⁶ Túpac-Yupanqui, p. 123.

⁷ Fe y Alegría Ecuador, *Acción Pública en Fe y Alegría Ecuador: Fundamentación y Experiencia* (Quito: Fe y Alegría Ecuador, 2016).

⁸ *Acción Pública*, p. 24.

society, church networks and other apostolic sectors. Its ambition is to seek to communicate the hopes of poor communities.⁹

This merging of advocacy and education is integration of the social and the educational apostolates *par excellence*. And the educational mission of FyA Ecuador itself, duly contextualized, coincides with that described in *Ignatian Pedagogy*:

It is a mission rooted in the belief that a new world community of justice, love and peace needs educated persons of competence, conscience and compassion, men and women who are ready to embrace and promote all that is fully human, who are committed to working for the freedom and dignity of all peoples, and who are willing to do so in cooperation with others equally dedicated to the reform of society and its structures. Renewal of our social, economic and political systems [...] calls for persons, educated in faith and justice, who have a powerful and ever growing sense of how they can be effective advocates, agents and models of God's justice, love and peace.¹⁰

If this is the pedagogical programme, how does FyA then proceed to implement it? The IPP stresses the importance of preparing pupils for participation in cultural growth. Thus beyond the technological skills necessary in the third millennium, education must impart 'the skills to lovingly understand and critique all aspects of life in order to make decisions (personal, social, moral, professional, religious) that will impact all of our lives for the better'.¹¹ In order to acquire these skills students need to be educated for responsible citizenship.¹²

Beyond mere academic competence to be acquired 'to everybody's profit and advantage'¹³ the aim of Ignatian pedagogy is the formation of critical thinking and education for citizenship to form agency and participation, underpinned by Gospel

⁹ 'Characteristics of the Global Ignatian Advocacy Network of networks', <<http://www.ignatianadvocacy.org>> [accessed 25.10.2019].

¹⁰ *Ignatian Pedagogy* 17, pp. 242–43.

¹¹ *Ignatian Pedagogy* 80, p. 267.

¹² 'It is the right and responsibility of every citizen to judge and act in appropriate ways for the emerging human community. People need to be educated for responsible citizenship', *Ignatian Pedagogy*, 79, p. 266.

¹³ Polanco, quoted in O'Malley, 'How the First Jesuits Became Involved in Education', p. 66.

values and an awareness of social justice. It is, as Kolvenbach suggested, geared to action: this is what it means to be a person of conscience and commitment.

Here there is a clear discrepancy between FyA's rhetorical claims and the perception of its students and their communities as revealed in the case study. There are two possible reasons for this. One is that the local structures of living together in some way militate against the development of these qualities. The other is that FyA's approach is not totally effective in overcoming the particular local context. What can it realistically achieve in the particular setting of Ecuadorian Andean communities?

8.2 Opportunity freedom and the structures of living together

Exploring the socio-historical context of the Chimborazo province, Section 6.5 dwelt on the structures of living together not just of Ecuador and its highlands but more particularly of the indigenous communities served by FyA. Part of the choice of an urban as well as a rural control was precisely to ascertain the differences between the rural indigenous and the urban contexts.

The structures of living together of these communities are made up of separate but interwoven layers. At national level, there has been enormous progress in terms of education (literacy and numeracy) and health coverage, in particular for school children. But there is still progress to be made in rural areas, where maternal and child mortality remain high (Section 6.6). For the children that survive, the high rate of morbidity also inevitably affects both their ability to master skills and their evolving capabilities – a first disadvantage.¹⁴ At regional level, rural Chimborazo has the worst rates of unfulfilled basic needs in the country. Thus any downturn in the economy affects its population disproportionately.¹⁵ Socio-ethnic discrimination remains ingrained in the province in spite – or maybe because – of a high indigenous

¹⁴ Incidental evidence during fieldwork showed a reluctance on the part of indigenous populations to attend even their local hospital in town for fear of abuse by white or mestizo staff.

¹⁵ This was the cause of the indigenous uprising of October 2019, which followed the government's announcement that due to the need to repay the national debt fuel prices would rise by 100-123%: indigenous populations knew that this would exacerbate the inequality between them and other sectors of the population. Following the uprising fuel subsidies were reinstated.

presence. This limits the freedom to pursue valued ‘beings’ and ‘doings’, affecting, for example, employment opportunities.

As regards state education in Ecuador, it was until recent years considered very poor. It suffered from difficult access in isolated areas, irregular attendance due to the need for children to contribute to their family’s subsistence, inadequate teacher training and sometimes even patchy teacher attendance; and it was seen as being of no benefit for girls. Two factors have changed this: the 2012 Education Law has made education compulsory for all and teacher training more rigorous. And the rise of emigration towards the big cities and foreign countries has created a need for survival skills such as IT and English. Delivering these skills, however, depends on teacher availability. In isolated areas not all schools are connected to the Internet yet and English-speaking primary school teachers are virtually non-existent. This means that acquiring the skills giving the freedom to migrate to the city, let alone emigrate, is not realistically possible.

The last layer to be considered is that of the *ayllu*, a conservative unit fiercely preserving its ancestral knowledge, cultural identity, language and customs. What does agency mean in the context of these structures of living together?

In a capability framework, agency is a function of the ‘freedom to bring about achievements one values and attempts to produce.’¹⁶ Alongside individually chosen capabilities, becoming an agent of change requires mastering the relevant ‘building blocks’: critical thinking, education to citizenship, participation. And mastering these necessarily entails a sense of their importance for personal and social development. Within FyA’s Ignatian framework these dimensions should logically open up to a proactive commitment to social justice.

Here the findings of the survey reveal an issue. Yes, the youngsters feel that they have to some extent mastered these building blocks, with a gender difference though: the females were reluctant to describe these as aspects that they had really achieved.

¹⁶ Sen, *Inequality Re-examined*, p. 57 (see Section 4.2).

Yes, the parents seem confident that their school is developing these skills. And yet in group work, neither males nor females considered these dimensions to be of much importance. It is to FyA's credit that the youngsters, in their responses to the questionnaires, considered that they had received adequate teaching in this connection. But if they do not consider these capabilities to be important they are far less likely to use the opportunity or freedom to develop them in future. And whilst they give some importance to learning and practising their values in general, the sense of Christian leadership that would ensure that participation was explicitly directed to the common good and a just society is also absent.

Within the particular context of Andean communities in the province, two particular aspects would have impact on the children's freedom to develop what they may value, and even to understand the importance of agency for change: the 'shadow of the hacienda' and gender inequality.

8.2.1 Educating for transformation in the shadow of the hacienda

We have noted the link between education for social transformation and advocacy. Commenting on the theology of the latter, José Segura states that:

[f]ollowing God's example as related in the Genesis story, Ignatian advocacy attempts to be both companion and collaborator in the processes by which its beneficiaries acquire the capacities they need, and it does so without substituting for their efforts or trying to solve their problems from above. [...] Finding its model in the theology of creation, Ignatian advocacy seeks to modify the imbalances of power relations by empowering the persons on whose behalf it does advocacy.¹⁷

Two aspects are important here: the concept of accompaniment and collaboration, of journeying together, and the stipulation that the 'advocates' should not try to solve problems from above. There is no doubt that this is what FyA aims to achieve. Its philosophy, its history, its pedagogy and

¹⁷ José M. Segura SJ, 'A Theological Foundation for Ignatian Advocacy', *Promotio Iustitiae* 110 (2013/1), 6–12 (p. 6), <http://www.sjweb.info/sjs/documents/PJ_110_ENG.pdf> [accessed 04.10.19]. Segura stresses Ignatian advocacy as a process of transforming unjust structures as part of 'taking the crucified people down from the cross' (quoting Jon Sobrino, p. 9). Italics *not* in the original.

pastoral approach, its stance on advocacy reflect and confirm this approach. The question, however, is how this principle is translated into praxis in the particular setting of indigenous communities in rural Chimborazo.

Both the responses to the questionnaires and off-the-cuff remarks during the survey – between participants or directly to the researcher – demonstrated that parents and youngsters alike perceive FyA as a ‘superior’ body: a powerful external entity above themselves that could provide for needs well beyond education. Asked to explain how FyA supports them, a ten-year old replied: ‘Well, they just help us with *everything*, you see.’

FyA has a strict policy not to hand down charity, but this is not applied consistently. Every Christmas, for example, schools are visited by both a sponsoring company and the Jesuit curia in Quito. Both come to distribute much appreciated hampers of food and piles of second-hand clothing. ‘FyA helps by giving us *cositas, ropitas*, stuff like that, you see!’ explained a grandmother in another school. The words she used – little things, little bits of clothing – are precisely those reported by Tuaza in his study of NGOs. He argues that NGOs have replaced the hacienda in the local imaginary, with people still feeling dependent on an entity that will ultimately take care of them, as in the old days (see Section 7.1). State-led improvements in health, education and infrastructure have strengthened the impression that ‘progress’ is achieved by agency from outside rather than from the community itself. The researcher’s participant observation during the study confirmed that FyA is perceived in this way, even in the urban school. It is expected to help with health, food, clothing as well as education and developing the whole child.

The assistance that FyA provides is needed. Indeed, the organization would see this assistance precisely as part of ‘accompanying’, ‘collaborating’ in helping beneficiaries to acquire the necessary ‘capabilities’.¹⁸ But by the very fact of assisting, it becomes in people’s perception an organization providing

¹⁸ Elsewhere in the article Segura talks rather of ‘capabilities’.

as the old hacienda did; an organization on which the community depends to fulfil its basic necessities. In this sense the imbalance of power relations mentioned by Segura remains, and equality – what Clark¹⁹ calls ‘solidarity between agents’ – is no more than an aspiration. The only way to avoid perpetuating this sense of dependency which militates against the social transformation it seeks is for FyA to succeed in consolidating the building blocks of agency. This in turn would make children aware of the rights which, Tuaza claims, rural communities have never fully learnt to appreciate or exercise.

8.2.2 Gender equality

A second factor militating against the freedom and capability expansion of girls locally is gender inequality.

‘React Ecuador, machismo means violence’ was the title of a national campaign launched by the Ecuadorian government in 2011 in an attempt to sensitise public opinion to the problem of domestic violence, an issue closely related to gender equality and by no means restricted to the rural Andes. Yet following the murder of a woman by her Venezuelan ex-partner in Quito in January 2019, President Moreno responded not by focussing on the persisting issue of femicide, but by promising stricter control on immigration to avoid letting ‘delinquents’ into Ecuador.²⁰ This apparent blindness to a very serious issue highlights the challenges facing any organization hoping to promote integral human development for all in the Ecuadorian context, and indeed anywhere where women’s agency freedom has traditionally been severely curtailed.

¹⁹ Meghan Clark, *The Vision of Catholic Social Thought*, p. 112.

²⁰ María Sol Borja, ‘Violencia machista y xenofobia en Ecuador’, *New York Times ES* (Spanish language), 26.01.19, <<https://www.nytimes.com/es/2019/01/26/femicidio-ecuador>> [accessed 15.10.2019]. This tweet by President Moreno was reportedly followed by a recrudescence of attacks against Venezuelans in the country.

Common practice does not reflect the theoretical gender equality supposedly guaranteed in law, especially in terms of employment and opportunities for women to make use of their skills. This state of affairs is clearly visible in civic participation which, in rural areas, is mainly exercised within the confines of the *ayllu*. Although they sometimes participate in decision making women are never, in practice, elected to roles of leadership. This unfreedom, which is not legal but cultural, prevents women from both exercising their rights and developing valuable ‘beings’ and ‘doings’.

Here again, education is crucial for transformation. But as soon as this is stated, questions arise. In many parts of the world girls’ access to education has been limited. In Ecuador, the 2012 Law on Education made universal school enrolment compulsory. This seems to have been largely, if not universally, successful. Certainly, in the schools studied the proportion of female students was roughly equal to that of the males. The girls will then receive the same education as their male counterparts – and the focus, as recommended by the Sustainable Development Goals, is now on all youngsters receiving *quality* education.

But this does not necessarily mean equality. The hidden curriculum transmits cultural messages regarding gender, race and class. And beyond individual differences in converting opportunities, male and female schoolchildren have different needs. For girls, for example, security going to and returning from school is a crucial issue. Melanie Walker describes the impact of the lack of security in South Africa: rape followed by pregnancy will significantly curtail a girl’s chances of completing her education.²¹ This is precisely what happened in one of the sample schools soon after the study was completed. And in one of the rural controls, a 16-year-old marrying a schoolmate saw herself immediately barred from returning to college by her new husband on the grounds that she would in future only need homemaking skills.

²¹ Melanie Walker, ‘Selecting Capabilities for Gender Equality in Education’, in *Amartya Sen’s Capability Approach and Social Justice in Education*, ed. by Melanie Walker and Elaine Unterhalter (New York: Palgrave MacMillan, 2007), pp. 177-96 (p. 187).

Another issue impacting on adolescent girls' education is water. In this connection Walker reports on the adverse effect of menstruation on girls' attendance where water is not available, with ensuing impact on educational achievement. At the time of the study none of the schools in the sample had a reliable current water supply. This issue, sadly, occurs in poorer countries throughout the world.

There is thus no doubt that whilst the national, regional and local structures of living together impact on the rights and development of all indigenous children, the girls have less agency freedom and face far greater obstacles to fulfilling their full potential. No single organization can, on its own, change a culture, and certainly not in a few years. Although it is well used to working with the sensitive social system of the *ayllu* – its culture, its separate legal structure and sometimes its defensiveness, FyA may not have fully appreciated the importance of the old hacienda system in the local imaginary. Full-scale change will depend to a large extent on wider social changes. But every contribution counts. FyA's literature is carefully gender neutral although some older literature – such as the *Ideario*, that promises the advent of a 'new man', is still redolent of an older mindset. Teacher training on gender equality is highly necessary but can ultimately only be effective in tandem with a wider awareness of these issues in society. Examining three possible approaches to promoting equality in education – distributive equality, equality of condition (race, class etc.) and equality of capabilities – Unterhalter concludes that 'gender inequalities in education cannot be fully addressed by any single approach to gender or equality. The complexity and the import of social justice initiatives suggest all three are needed to complement each other and thus enhance policy and practice.'²² In the context of Chimborazo a combination of lack of resources and adaptive preferences mean the fulfilment of this aim is still a very long way away.

²² Elaine Unterhalter, 'Gender equality, Education, and the Capability Approach' in *Amartya Sen's Capability Approach and Social Justice in Education*, ed. by Melanie Walker and Elaine Unterhalter (New York: Palgrave Macmillan, 2007), pp. 87–109 (p. 104).

8.3 In search of continuous improvement: alternative curricula

Researchers working on children and agency development have suggested that one possible solution is to introduce a model such as ‘Philosophy for Children’ (P4C) into the curriculum. This is deemed to help in ‘developing critical thinking and democratic citizenship among children and youths, therefore connecting education to the “world beyond the classroom” and fostering the authentic expression of child and youth agency in an enlarged community.’²³ Following the tradition of Socratic dialogue, P4C aims to develop good judgment by including a critical component, a creative component (new ways of seeing) and a caring component (affective dimensions). In some ways this sounds highly attractive for a more traditional context such as Chimborazo where repeating and memorizing is still often encouraged over critical thinking, especially at primary level. On the face of it, it could be useful for youngsters in need of a better appreciation of agency and participation.

There are, however, two possible drawbacks to this proposal in the case of the schools considered here. Firstly, the Ecuadorian education system already provides a philosophy curriculum for students aged 14+. Even assuming the introduction of philosophy at an earlier stage as a possibility – and at the moment this would be, to a large extent, pedagogically counter-cultural – there remains another serious objection to the proposal. Biggeri states that ‘in policy terms, the wide variety of educational models and methodologies within the Western tradition (Nussbaum, 2010) provides interesting opportunities for innovative and transformative proposals consistent with the capability approach.’²⁴ In other words the models proposed, including P4C, are fundamentally *Western* models. In a context where the bilingual education template rejects standard Ecuadorian pedagogical models precisely as too Western and

²³ Mario Biggeri, ‘Education Policy for Agency and Participation’, in *Agency and Participation in Childhood and Youth*, edited by Caroline Sarojini Hart, Mario Biggeri and Bernhard Babic (London: Bloomsbury, 2014), pp. 44–62 (p. 53–4). The reference to Martha Nussbaum in this passage is to *Not for Profit: Why Democracy Needs the Humanities (The Public Square)*, (Princeton: Princeton University Press, 2010).

²⁴ Mario Biggeri, ‘Education Policy’, p. 53.

formulates instead alternatives based on an Andean cosmovision, it is highly improbable that this proposal would be acceptable. It is more likely that it would be perceived as yet another attempt to impose an alien worldview liable to distort local culture and identities, thereby perpetuating an oppressive colonial model.

Are there viable alternatives? One answer could be to consider anew Paulo Freire's pedagogical model. For Freire, agency was achieved by raising awareness of the nature and causes of the learner's social context. This process was an essential part of any learning and a *sine qua non* condition for personal and social transformation. Originally at least, this philosophy related to non-formal adult education: developing agency with young children and teenagers in a formal school context is a different matter, and a long-term process rather than a quick remedy. It was counter-cultural then, alien to a philosophy that believed in beating knowledge into children²⁵ rather than developing their critical thinking and sense of agency. The expectation that children should simply repeat and memorise was observable in classrooms during the study and the practice was also mentioned as an explicit criticism in one of the context analyses. And in the particular context of Chimborazo, if Tuaza is right that democratic rights are not yet fully exercised, Freire's style of awareness-raising could still have an important role to play in the classroom. Conscientisation, certainly in the guise of its modern version, education for citizenship, is still needed. And it is needed not just to develop agency and encourage participation, but also to tackle the many adaptive preferences that currently actively lower expectations – in relation to the quality of education, domestic violence, gender equality, even the complete fulfilment of basic needs – and thus militate against change. In all these areas the surviving sense of dependency on a powerful external entity is an obstacle to human development and social transformation. The question raised by Segundo, however, still remains relevant – and unanswered: can conscientisation be for everyone? We shall return to this question.

²⁵ Ecuador only moved away from this principle of 'spare the rod, spoil the child' by banning corporal punishment in schools in 2012. It has also committed to preparing legislation prohibiting all corporal punishment of children.

8.4 ‘Transforming spirituality’

Like the title of David Bosch’s *Transforming Mission*, the concept of ‘transforming spirituality’ in English could have two meanings: a spirituality that brings about transformation, or one that is itself the object of transformation. The Spanish language allows no such ambiguity. FyA’s *espiritualidad transformadora* is a spirituality that transforms; and being geared to committed action – to agency – it aims to transform not just the individual, but society.

This *espiritualidad transformadora* is a performative spirituality which, according to FyA, can be understood only in relation to a given reality and to daily life within that reality. In practice this means, it contends, a spirituality incarnated in the reality of the poorest, a spirituality of liberation, an ‘apostolic and prophetic spirituality committed to social transformation and the building of a new humanity: the kingdom of God’.²⁶ In this connection, FyA identifies the challenges to its mission as developing Gospel values within a lay education system, developing intercultural and interreligious dialogue, promoting inclusion and denouncing social injustice.²⁷

The transmission of spirituality, the ability to ‘acknowledge God’²⁸ and develop faith as part of integral human development, and as a corollary the question of how to measure an institution’s effectiveness in transmitting these capabilities, have been recurrent themes in the study. Whilst some FBOs have focussed on secular education as a tool for development, Vélaz fought to ensure that what he saw as a liberationist focus on material needs would not distort FyA’s underpinning: the experience of a Christian life (*una vivencia cristiana*) centred on Jesus of Nazareth²⁹ as the foundation on which to build a more just society. This remains at the root of its identity, enshrined in its ethos statement.

²⁶ *Horizonte*, pp. 62–70.

²⁷ *Horizonte*, pp. 70–72.

²⁸ *PP* 21.

²⁹ *Horizonte*, p. 64.

But this ideal has been affected by two major developments: state funding and a different approach to inclusiveness in a lay setting. The movement's victory in obtaining at least partial state funding in much of the continent has also had a drawback. For FIFYA, a state-imposed curriculum and the values it promotes actively hinder the catholicity of state-funded schools as compared with their independent counterparts.³⁰ This is not unique to FyA, or to Latin America: state-funded Catholic schools anywhere would relate to this problem. But the issue of inclusiveness is maybe more problematic. Combined with state funding, an increasingly diverse pupil intake in a lay environment has led to a reluctance to mention Jesus Christ explicitly for fear of alienating non-Christians or being seen as discriminatory. Nor did FyA want the questionnaires to refer to 'Gospel values'. Its answer to these dilemmas is to focus on promoting spirituality outside any religious context. Is this a betrayal of its Ignatian roots?

In a letter purportedly written by Ignatius to a modern Jesuit, Karl Rahner speaks about the need for all to have the immediate experience of God:

Human beings can experience God's own self. And your pastoral care must have this goal in sight always, at every step, remorselessly. If you fill up the storehouses of people's consciousness only with your theology, however learned and up-to-date it is, in a way that ultimately engenders nothing but a fearful torrent of words; if you train people only for devotion to the Church, as enthusiastic subjects of the ecclesiastical establishment; if you make the people in the Church no more than obedient subjects of a distant God represented by an ecclesiastical hierarchy; if you don't help people beyond all this; if you don't help them finally abandon all tangible assurances and isolated insights and go with confidence into that incomprehensibility where there are no more paths, if you don't help them manage this both in life's situations of ultimate, inescapable terror, in a love and a joy that do not admit of measurement, and then, radically and ultimately, also in death, with Jesus dying in Godforsakenness – if you don't help people in this way, then, in what you call your pastoral care and missionary vocation, you'll have either forgotten or betrayed my 'spirituality'.³¹

³⁰ Pérez Esclarín, 'Algunas notas sobre la identidad de Fe y Alegría', 75–94.

³¹ Karl Rahner, 'Ignatius of Loyola Speaks to a Modern Jesuit', quoted in Philip Endean SJ, *Karl Rahner and Ignatian Spirituality*, Oxford Theological Monographs (Oxford: Oxford University Press, 2001), p. 17. See also Karl Rahner, *Ignatius of Loyola*, ed. by Paul Imhof SJ, trans. by Rosaleen Ockenden (London: Collins, 1979), pp. 11–38 (p. 14).

For Rahner's Ignatius, the activities of a modern Jesuit should focus on offering 'mystagogical help for others' so that all can experience clearly and accept the immediacy of God.³² In other words, the first task must be 'to show the way to God through the Spiritual Exercises and discernment.'³³

If the communication of God's presence, the mystagogy, is the all-important task at the root of spirituality beyond dogma and even religious faith, then FyA's approach in promoting this spirituality, regardless of faith background, remains very much the expression of an Ignatian tradition. It leaves the organization with two major questions, however. Firstly, is FyA as a teaching organization succeeding in effectively transmitting this sense of the immediate presence of God – a question that also applies to any Jesuit and, indeed, Christian institution? Secondly, can FyA in a lay environment still promote a Christian proactive commitment to social justice based on Gospel values?

If we return to the Exercises as the means for an immediate experience of God, Segundo maintains that strikingly, 'in the Exercises, in the First Principle and Foundation specifically, the destiny of the human being and its existence in the world is decided without an apparent relation to Christology.'³⁴ In the Contemplation to Attain the Love of God again, he continues, the relationship under consideration is that between the Creator and His creature, without any reference to christology. What FyA then is hoping to achieve appears to be this enabling of the relationship between God and His creature: an Ignatian spiritual outlook that encompasses all religions. If communicating the immediate presence of God beyond dogma and devotion to the Church is the priority, then this should theoretically be transmittable to youngsters of any faith background.

³² *Karl Rahner*, p. 47. Rahner specifies that this should be on an individual basis rather than 'the official organization through the Church which would be given to innumerable people at the same time (p. 48).

³³ UAP, First Preference.

³⁴ Juan Luis Segundo SJ, *The Christ of the Ignatian Exercises, Jesus of Nazareth Yesterday and Today*, IV, ed. and trans. by John Drury (Maryknoll: Orbis Books, 1982), p. 41.

This approach, however, focusses on particular elements taken outside their full context – and in the case of the Exercises, out of the christological context of the second to fourth week, which ultimately conditions the Contemplation. If the christological context is ignored, then ‘transforming spirituality’ may mask the fact that the ‘faith that does justice’ focusses on justice to the detriment of faith. It risks becoming little more than a general moral outlook with an Ignatian flavour.

Realistically, in a pluralist society education for justice as an expression of love of God and neighbour will ultimately only touch a minority. This is even true in deeply Christian Chimborazo: it is precisely what is happening with CEFA, FyA’s secondary-age pastoral programme of Christian leadership. The result is that without intending to do so, institutions ultimately end up focussing on the few – the ‘elite’ – and, explicitly or not, forming them to lead the many. This is a point maybe which warrants further reflection in any Christian institution.

This may go some way to explaining the results of the survey and why they fail to match FyA’s expectations. In questionnaires, young children in particular thought that they were learning values and putting them in practice and were supported by their school in doing so. (This, incidentally, also applied in the state-run controls.) Group work, however, revealed a different picture: there learning and practising values were less prominent, although more so in FyA schools than in the state-run rural controls. But ‘Christian leadership’ was only selected as important by a very few and spirituality by none (see Figures 7.11 and 7.12).

In the case of primary-age children interpreting these results requires some caution. The questionnaires were deliberately worded to reflect the vocabulary used by FyA’s MIFA pastoral programme. But do primary school-age children have the cognitive abilities to relate their lived experience fully to this vocabulary, these concepts? What does a 9-year-old actually understand when designated as a ‘Christian leader’, or when promising ‘allegiance’ to a designated Christian leader in their group? How meaningful is the process in a school where a proportion of the children have another faith or none – a question that arises in every Catholic school? Conversely, if the

children do not have the cognitive abilities to relate their life experience to the vocabulary of the programme, then what does the programme actually achieve?

These are questions for FyA to answer, and it is constantly reviewing its pastoral provision. The issue for secondary-age children is different. The few that opt to follow the CEFA programme are already committed, and the accent there is on developing Christian leadership. Christian leadership is, after all, what an Ignatian education aims to achieve. It is an answer to the formation of conscience, compassion and commitment to social justice. FyA follows the pattern used in independent Jesuit colleges in this connection. But in the schools studied Christian leadership was poorly understood outside the self-selected followers of the programme. And, inexorably, we return again to the possibility that even if conscientisation is open to all, Christian leadership is only for the few.

According to the findings of the survey there is thus a serious question mark over the extent to which FyA is achieving the ‘mystagogical help’ recommended by Rahner. But Vélaz’s question in Section 3.2 springs to mind here: ‘Do the other works of the Society then manage to achieve this?’ Padre Alaña, when discussing FyA and Jesuit institutions generally, lamented that the Society in Ecuador had generally failed to transmit the full Ignatian dimension of its educational vision, and this both in *educación popular* and in the private schools (see Section 3.4 above). This he attributed to ‘a failure to give the proper “method and order”, a failure in mystagogy’.³⁵ A serious question for the Society is whether Jesuit institutions elsewhere are faring any better in this regard.

³⁵ Private conversation quoted with permission.

8.5 Faith, *ignacianidad* and Jesuit dependencies

The difficulty of promoting Gospel values in a lay environment, which FyA sees as one of its challenges, leads to somewhat mixed messages in its more recent literature. Sometimes it speaks of its ambition to form people ‘centred on Jesus of Nazareth and able to take on his role in the world’.³⁶ At other times its approach is much more universalist:

Although the inspiration of [our] movement is a Christian one [...] we must progress to recognizing one common God who invites us to join forces with different forms of expressions of faith as we work towards a broad community that promotes a more human and just world.³⁷

This leaves us with the second question raised above: is FyA, having to operate in a lay environment which prevents it fully voicing the faith at its core, in danger precisely of decoupling faith from justice?

FyA is walking a fine line between a universalist message and its adherence to a Trinitarian faith which it no longer feels free to express openly. It has managed so far to follow both, at the cost sometimes of absolute clarity. In two of the sample schools in Chimborazo the intake was exclusively Catholic, and in both cases the Trinitarian message was clearly delivered in the classroom by the Catholic headteacher – the only teacher in the school. In the third school, with teachers of different denominational backgrounds, the evangelical families wished for much greater reliance on Scripture. The situation becomes even more problematic in urban settings where the faith background is more mixed and the majority of pupils may, one day, consist of non-believers. In addition, lay states typically discourage explicit expressions of religion in the schools they fund.

FyA is only too aware of these difficulties, which are shared to some extent by all state-funded Christian schools. But its dilemma in turn raises two further issues. Firstly, FyA’s *ignacianidad*, as explained in Section 3.4 above, is also made up of

³⁶ *Horizonte*, p. 65.

³⁷ *Horizonte*, p. 71.

the various charisms of the many religious orders which run FyA centres on its behalf. The dilution of the Christian ethos of these centres is bound to be problematic for them too. Secondly, Vélaz ensured that wherever FyA was implanted it was, contractually, a dependency of the Society of Jesus. FyA does follow an Ignatian expression of spirituality. But being a Jesuit is explicitly to be a follower of Jesus. Schools rooted in their Christian faith that also encourage dialogue with all religions are part of the Jesuit tradition. But schools that accept all worldviews on an equal footing are not. What control does the Society have over an organization that finds itself forced to dilute its Christian ethos one step too far? What action would it consider taking? This could prove be a particular issue in Ecuador, where the Society has remained ambivalent towards FyA to the extent that the two, according to some Jesuits locally, work 'in parallel' rather than together. It is conceivable that a time may come when issues of control over a dependency that can no longer openly proclaim the Gospel message will have a major impact on FyA's relationship with the Society and thus on its own way of proceeding.

8.6 Conclusion

FyA and smaller FBOs operating in the region all have a distinct approach and fulfil different needs but they share many challenges. FyA has contextualized Ignatian education to bring the chance of integral human development to indigenous children in rural areas and social transformation to their impoverished communities. But their dilemmas are similar. Poverty, racial and social discrimination, gender inequality, violence in and outside the home can take a generation or more to change.

Youngsters, and their communities, are not fully aware of their rights or their own ability to transform. Development, if it is to be led by agents of change, inevitably tends to focus on the few rather than the many. And all-inclusiveness risks diluting the Christian ethos to the point that transformation may no longer operate for the common good.

Progress and development in Chimborazo are valued but have traditionally been brought by outside agencies: the state, NGOs, FBOs. The collective agency of indigenous movements can bring results, but these have not infrequently proved to

be ephemeral. By contrast the notion of individuals becoming agents of transformation that slowly bring change to the conditions of daily lives is, to some extent, countercultural. Half a century after Freire, raising socio-political awareness is still very much necessary in order to decrease dependency and improve life chances. Offering this within a context of ‘transforming spirituality’ is not, in itself, difficult. The difficulty, as shown by the surveys, lies rather in actually transmitting this awareness, this spirituality; and more still in reconciling the two as part of an explicitly trinitarian vision in a pluralist environment. The latter is a challenge for state-funded Christian education everywhere; the former is a challenge for *all* Christian education. This notwithstanding, FyA continues, in line with the Ignatian tradition of advocacy, to accompany people, without trying to solve their problems from above, in the creation of a just society for a hope-filled future.

Concluding Remarks

The aim of this study has been to explore the application of the CST principles of integral human development to a particularly vulnerable group: children at the frontier. As an exemplar of praxis it delves into the educational philosophy and practice of the Society of Jesus from its early days to GC 32 and its absolute connection between faith and justice, and to the developments that followed. Implementing justice in education for all, especially the most vulnerable children, demands working towards a vision of integral human development such as outlined in *Populorum Progressio* and later encyclicals. The first question to answer regarding Ignatian *educación popular* is thus: is it effective in delivering both individual and social transformation? The answers reached in this thesis contain implications far beyond Ignatian *educación popular*, as many of the challenges faced by FyA are shared by all Ignatian education and indeed, all Christian education, in particular state-funded education. A capability-based approach was used to measure the organization's impact on personal as well as social transformation in education. It has given valuable results, which suggests that such an approach, suitably adapted, could usefully be applied to the evaluation of pastoral projects as part of the activity of the Church as a whole.

Let us begin with the integration of the social and education apostolate in the Society of Jesus, as exemplified by FyA. Has it been implemented? Has it achieved – indeed, can it achieve - educational justice? Ignatian principles of education are geared to developing the whole child and all the child's capabilities in order to form competent, compassionate human beings committed to working for the common good. The connection between faith and justice and its application to the education of children at the margins is at the heart of what the Society of Jesus stands for, and it is not new: it corresponds precisely to the vision of the First Formula, 'the progress of souls in Christian life and doctrine' and the education of children - poor children in particular. In this sense, in many ways the creation of FyA can be seen for the Society of Jesus as returning to its roots before even the Second Vatican Council.

The practice of *educación popular* is truly ‘at the centre of [its] educational vision.’¹. It also corresponds to the Society’s determination to work for justice at the ‘frontier’. The history of FyA’s foundation demonstrates the challenges this can entail in practice. All *educación popular*, Ignatian or otherwise, aims to fulfil the Church’s goal to alleviate inhuman conditions, ‘to ensure that no one is marginalized’,² thus working towards personal and social transformation. Evangelization is also an essential part of Christian *educación popular*. How then can we evaluate the integration of the social and the education apostolate? How can we know that Decree Four is being implemented in education?

It is my claim that a full answer to this question requires a quantitative measurement of impact alongside other forms of evidence. Holland and Henriot suggested the pastoral circle of analysis-action-reflection as a diagnostic method and recommended in addition the use of a quantitative tool where possible. Such a tool makes for a sharper diagnosis. In so doing it provides the basis for addressing any weakness in implementation and can underpin a sounder planning for the next stage of action. Sen similarly argues for constant monitoring of the outcomes of any action for justice: this is for him a ‘constant and inescapable part of the promotion of justice.’³ For Christian education, especially in a ‘developing’ region, such monitoring must go well beyond an institution’s impact on academic outcomes, a feature usually monitored by state agencies. Beyond attempting to address less than human conditions, it means evaluating the development of the building blocks of agency for change - critical thinking, citizenship, participation - as well as moral and spiritual development and commitment to the common good. A capability-based approach is an invaluable tool in this respect. In an education context, it is flexible enough to be adapted to any local circumstances and to focus on any set of capabilities including the organization’s development of collective and spiritual capabilities, a feature less often considered by the CA. Used in combination with qualitative data for triangulation, such a method can throw light on inequalities at local level and

¹ José Alberto Mesa SJ, ‘Popular education at the center of our educational mission’, *Promotio Iustitiae* 114/1 (2014).

² John Paul II, *Ecclesia in America*, 58.

³ Sen, *The Idea of Justice*, p. 86.

indicate areas where improvement is needed. It thus constitutes a highly valuable evaluation tool for any Christian organization working with children.

In the case study presented here this method yielded quantitative results which, at a general level, largely corroborated the findings from qualitative sources. But it also had the advantage of being sensitive enough to highlight issues specific to given schools: be it an unusual amount of domestic violence, different attitudes to education or a 'culture clash' between different Christian denominations. Together the two sets of data, qualitative and quantitative, underline the fact that due to the national as well as local historical and socio-economic background, the structures of living often work against the children's opportunity freedom. These structures include racism, poverty, social discrimination, gender inequality and a high incidence of domestic and other violence. They do affect the development of capabilities, especially for girls. FyA is well aware of these difficulties. At practical level, the challenge it faces is not just to identify issues in the hidden curriculum or day to day practices, but also to attempt to negotiate a way forward which at times may challenge local customs or even national culture. Gender equality and domestic violence are cases in point. In such cases, FyA depends to a significant extent on the winds of change in society. But its prophetic denunciation of injustice is part of social transformation and can itself have some influence on these winds of changes in broader society.

The study has also highlighted a different sort of issue for Christian education, whether an FBO offering *educación popular* in a developing region, or an organization providing private education in affluent settings. In a pluralist society, to what extent can institutions, especially those funded by states that promote lay education and values, effectively transmit the Christian message and its implications for social justice? As regards a faith-based commitment to social justice, promoting personal agency and social responsibility and preparing for leadership according to Gospel values are at the core of FyA's work, in the Ignatian tradition. But all-inclusiveness means that in practice the message of active faith-based commitment is only likely to touch a minority. This has to be a major challenge for all Ignatian education. Critical thinking, citizenship, participation – the building blocks of agency and the path to conscientisation highlighted in the Ignatian Pedagogical

Paradigm – are open to all. But not all will be able to avail themselves of the opportunities they offer. Conscientisation does not equate to agency for change: only a few self-selected students opt for a leadership programme. Thus without intending to, the institutions do end up forming an ‘elite’ – the little flock that will lead the multitude.

When it comes to promoting openness to the transcendent – Rahner’s ‘immediate experience of God’ – again FyA is hampered by state demands for a lay vision and torn by its desire for inclusiveness of all regardless of religious background. It has thus chosen to promote a ‘transforming spirituality’ to underpin its quest for justice, an approach which is also part of the Ignatian tradition. Still asserting its Christian roots, it has nonetheless adopted a more universalist message and promotes ‘one common God’⁴ who invites all to join forces for justice as part of their different ways of expressing their faith: a message of performative faith beyond any particular dogma. This move towards a universalist approach is maybe inevitable and it does have great value in promoting openness to the transcendent. Yet it is not without danger. Without an explicitly trinitarian dimension there is a risk that the faith that does justice may become so diluted as to be little more than general goodwill towards the poor and marginalized, a moral aspiration couched in vague Ignatian terms but not necessarily connected to committed action.

In these complex circumstances and changing times, is Decree Four then being implemented in education? FyA, alongside its work of education, continues its prophetic denunciation of injustice, thus trying to address structural injustice as the same time as bringing integral development to its pupils through education. Its way of proceeding is in itself an unending integration of the social and education apostolate. Yet as part of this journey, further challenges constantly arise to remind us that such integration is not an end point, but a continuous process. Nothing illustrates this better than the unexpected challenge which FyA now finds itself facing. As this conclusion is being written, Ecuador is just beginning to emerge from ten weeks of lockdown, a process which has devastated the economy at every level.

⁴ *Horizonte Pedagógico Pastoral*, p. 71.

Chimborazo has had relatively few cases of Covid-19 but has recorded a death rate of over 28% of cases, one of the highest in the land, partly due to underlying diseases and chronic malnutrition.⁵ According to current estimates the poverty rate is likely to climb from 25% to between 29% and 31.9%.⁶ Here, as elsewhere, schools have been closed and classes supposedly delivered via the internet. But in poor rural areas not all families own a computer, let alone more than one; and not all areas have adequate internet coverage. Remote teaching has had patchy results. The reality is that the educational gap between middle-class urban centres and poorer children, especially in rural areas, is likely to widen considerably as a result.⁷ A lot of the gains made over the years in terms of social transformation risks being wiped out. It could take years before this is fully remedied. In the immediate future the first priority will have to be, as it was thirty years ago, the ‘ethical imperative’⁸ of feeding the hungry and addressing basic needs. This is a stark reminder of what a slow, thankless task working for IHD and social transformation can be. Improvements can never be taken for granted, progress is never linear. The work remains eternally unfinished business, with new rules to be endlessly relearned as social, economic and political conditions evolve.

Moving beyond education, how can this study contribute to pastoral theology as a whole? In the introduction we were reminded of the circularity between the teaching of the Magisterium, the praxis which seeks to implement it, and the non-official body of commentaries and discussion offered by theologians, philosophers, economists, specialists and practitioners in many disciplines. Catholic social teaching, non-official thought and praxis form a hermeneutic circle, so that all three feed each other and form an interdependent whole, and each one can only be fully

⁵ *La Prensa de Chimborazo*, ‘Chimborazo con uno de los índices de letalidad más alto del Ecuador’, 17.05.2020, at <<https://www.laprensa.com.ec/category/actualidad/p/4/>> [accessed 10.06.2020].

⁶ *La Prensa de Chimborazo*, ‘Estudio proyecta 29 de pobreza este 2020’, 16.06.2020, at <<https://www.laprensa.com.ec/estudio-proyecta-29-de-pobreza-este-2020>> [accessed 16.06.2020].

⁷ *La Prensa de Chimborazo*, ‘La educación en línea no funciona en Chimborazo’ (19.05), at <<https://www.laprensa.com.ec/educación-linea-no-funciona>> [accessed 16.06.2020] points out the lack of access to online education for many children in the region. A further article points out the dire statistics – 48.8% child malnutrition and high incidence of child labour – and asks: where are the children’s rights? ‘Chimborazo con 48.8% de desnutrición infantil’, <<https://www.laprensa.com.ec/donde-estan-los-derechos-de-los-ninos>> [accessed 16.06.2020].

⁸ CV 27.

understood by reference to the others. Since Vatican II, non-official Catholic Social Thought has moved away from the mere ‘exposition, exegesis or discussion of the social encyclicals’⁹ towards a greater consideration of praxis. This shift means a new dynamic dimension for pastoral theology. It is through the praxis that the Church’s vision is realized and brought nearer to representing a perfect theory of justice. In order to achieve this, it needs to borrow from other disciplines and effect a ‘synthesis between the responsible use of methods proper to the empirical sciences and other areas of knowledge [...] as well as faith itself.’¹⁰ The study of a particular implementation of the Church’s vision of IHD presented here is a case in point. Acquiring a full understanding of the particular circumstances and issues of a specific group at a given time, in a given place, was best achieved in the first instance through a variety of qualitative methods to allow for triangulation. Beyond this, the use of a capability-based approach has made it possible to obtain quantitative data for all dimensions of IHD under scrutiny. This has proved a highly flexible tool, suitable for adaptation according to circumstances - location, time and the characteristics of a population or organization. It has made it possible to focus on selected areas and yielded quantitative as well as qualitative data relating to the impact of an organization working for the whole spectrum of human development as well as social transformation. This has proved invaluable in the study of an educational venture. There is no reason why it could not be equally useful in the evaluation of other pastoral projects.

Finally, what of the children Canton Guamate and other children like them? As the local press laments the collapse of education in rural Chimborazo, as UNICEF claims that well over one million children may die in the aftermath of the coronavirus pandemic,¹¹ can the praxis of an individual organization such as FyA alone constitute ‘a coherent and cohesive treatment of justice’¹² and make children more visible? FyA’s praxis is only one point in the hermeneutic circle described

⁹ Boswell, McHugh and Verstreten (eds.), *Catholic Social Thought*, p. XIII.

¹⁰ *EG* 242.

¹¹ United Nations News, 12.05.2020, ‘Covid-19 pandemic “quickly becoming a child rights crisis”: Daily death rate could spike by 6,000 for under-fives’, <<https://news.un.org/en/story/2020/05/1063822>> [accessed 24.06.20]

¹² Regan, p. 1031.

above. As Regan remarked in 2000, theory regarding justice for children lags behind practice, both in philosophical discourse and more particularly, in the case of CST.¹³ CA practitioners are now adapting the CA discourse to analyse children's development, their rights and their needs, and evaluate and monitor praxis for justice in this regard. CSPraxis, and increasingly non-official Catholic Social Thought, are doing the same. In order to complete the hermeneutical circle, we need a strong statement from the Magisterium. Only this can at last give full visibility to children - 'arguably the most marginalized group in all of history.'¹⁴ Only this can represent a truly coherent and cohesive treatment of justice for children according to the principles of the great Catholic social tradition.

¹³ Regan, p. 1031.

¹⁴ John Wall, *Ethics in the light of Childhood*, p. 1.

Appendix 1: Maps of Ecuador



Map not subject to copyright

Appendix 2: Questionnaires

Questionnaire 1a: youngsters

Which aspects¹ are important for the well-being of all young people of your age?

Which aspects are important for yourself, your well-being and the well-being of your family/community?

ASPECTS	For all children/ youngsters of your age	For yourself	Is this something you currently have in your life?					
			No	A little	More or less	A great deal	Totally	I don't know
Right to life								
Health/well-being								
Nutrition/food								
Shelter/accommodation								
Love and care of family and friends								
Safety/freedom from violence								
Culture, identity, language								
Education								
Learning to think for myself								
Participation: expressing opinions, participating in decision making (e.g. at school etc.)								
Learning to be citizens								
Freedom of political/religious opinion								
Play/free time/relaxation								
Respect for nature								

¹ The wording initially suggested by the researcher referred to 'dimensions' or 'potential'. However, FyA advised that these terms would not be clear to participants and advised the use of 'aspects' instead.

(Questionnaire 1a: youngsters)

ASPECTS	For all children/ youngsters of your age	For yourself	Is this something you currently have in your life?					
			No	A little	More or less	A great deal	Totally	I don't know
<i>Convivencia</i> ²								
Reciprocity								
Solidarity								
Buen Vivir/Sumak Kawsay ³								
Learning moral values ⁴								
Developing your spirituality								
Learning Christian leadership								
Practising your faith/values								

² *Convivencia* relates to positive, peaceful interaction between members of a group. *Convivencia escolar* is the product of good relations between all members of the school community, who are seen as co-actors in managing relationships. Education for *convivencia* starts from the first year of schooling and involves teaching a sense of responsibility, respect and tolerance for all members of the institution <https://www.ecured.cu/Convivencia_Escolar=Caracter.C3ADsticas>.

³ Contrary to suggestions made by some scholars (Radcliffe 2015), participants in communities preferred to use Buen Vivir rather than Sumak Kawsay.

⁴ The researcher wanted to focus specifically on Christian values. However, FyA was not prepared to accept this on the grounds that it would exclude those youngsters and parents who were not Christian (see Sections 9.4 and 9.5)

Questionnaire 1b: parents

Aspects that you value, all aspects that are important for you personally, for your well-being and the well-being of your children, your family and your community.

ASPECTS	For your children	For yourself and your family	At present have you achieved this aspect?											
			No		A little		More or less		A great deal		Totally		I don't know	
			Your children	Yourself	Your children	Yourself	Your children	Yourself	Your children	Yourself	Your children	Yourself		
Life														
Health/well-being														
Nutrition/food														
Shelter/accommodation														
Love and care of family and friends														
Safety, freedom from violence														
Culture, identity, language														
Education														
Learning to be citizens														
Learning to think for yourself														
Participation: expressing opinions, participating in decision making														
Freedom of political/religious opinion														
Play/free time/relaxation														
Respect for nature														

(Questionnaire 1b: parents)

ASPECTS	For your children	For yourself and your family	At present have you achieved this aspects?										
			No		A little		More or less		A great deal		Totally		I don't know
			Your children	Your-self	Your children	Your-self	Your children	Your-self	Your children	Your-self	Your children	Your-self	
<i>Convivencia</i>													
Reciprocity													
Solidarity													
Buen Vivir/Sumak Kawsay													
Learning values													
Developing spirituality													
Learning Christian leadership													
Practising your faith and values													

Questionnaire 2a: school's impact (youngsters)

Does *Fe y Alegría* help you achieve those aspects that you value, everything you think is important for youngsters your own age and for yourself, your well-being, and the well-being of your family and community? How?

ASPECTS	Does <i>Fe y Alegría</i> help you achieve these aspects and how?					Can you explain how?
	No	A little	More or less	A great deal	Totally	
Right to life						
Health/well-being						
Food/nutrition						
Shelter/accommodation						
Love and care of family and friends						
Safety, freedom from violence						
Education						
Culture, identity, language						
Education for citizenship						
Teaching me to think for myself						
Participation in decision making, expressing opinions						
Freedom of political/religious opinion						
Play/free time/relaxation						
Respect for nature						

(Questionnaire 2a: school's impact - youngsters)

ASPECTS	Does <i>Fe y Alegría</i> help you achieve these aspects? How?					Can you explain how?
	No	A little	More or less	A great deal	Totally	
<i>Convivencia</i>						
Reciprocity						
Solidarity						
Buen Vivir/Sumak Kawsay						
Learning values						
Developing my spirituality						
Learning Christian leadership						
Practising my faith and values						

Questionnaire 2b: school's impact (parents)

ASPECTS	Does <i>Fe y Alegría</i> help you achieve these aspects? How?										
	Your children					Yourself, your family and your community					Can you explain how?
	No	A little	+ o -	A great deal	Totally	No	A little	+ o -	A great deal	Totally	
Life											
Health/well-being											
Food/nutrition											
Shelter/accommodation											
Love and care of family and friends											
Safety, freedom from violence											
Education											
Culture, identity, language											
Learning to think for oneself											
Participation in decision making, expressing opinions											
Learning to be citizens											
Freedom of political/religious opinion											
Play/free time/relaxation											
Respect for nature											

(Questionnaire 2b: school's impact - parents)

ASPECTS	Does the school help your children and yourself achieve this aspect? How?										Can you explain how?
	Your children					Yourself and your family					
	No	A little	+ o -	A great deal	Totally	No	A little	+ o -	A great deal	Totally	
<i>Convivencia</i>											
Reciprocity											
Solidarity											
Buen Vivir/Sumak Kawsay											
Learning values											
Developing spirituality											
Developing Christian leadership											
Practising your faith and values											

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