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Between Exile and Utopia:

Carlos Alberto Torres and the Making of the Political Sociology of Education

A dissertation submitted in partial satisfaction of the

Requirements for the degree Doctor of Philosophy

in Education

by

Belzu Gabriel Jones

2021

ABSTRACT OF THE DISSERTATION

Between Exile and Utopia:

Carlos Alberto Torres and the Making of the Political Sociology of Education

by

Belzu Gabriel Jones

Doctor of Philosophy in Education

University of California, 2021

Professor Carlos A. Torres, Chair

Carlos Alberto Torres has been one of the most prolific and influential theorists of education over the past half century and is the preeminent scholar in the founding and development of the subfield of the political sociology of education, which critically examines the operations of power and inequality in education, their role in social and cultural reproduction, and their effects on the concepts and practices of democracy, citizenship, and multiculturalism. This dissertation provides the first major study of Torres' work to chart and critically assess his intellectual development, theoretical contributions, and influence within that subfield, exploring both his experiences growing up in Argentina and living in the United States that shaped his perspective on the relationship between power and knowledge as well as the broader historical and intellectual environment that led to the emergence of critical studies within education that eventually gave rise to the political sociology of education. A historical-biographical approach is

taken to provide a brief intellectual biography of Torres, and a historical, theoretical, and philosophical approach is taken to examine the intellectual context in which his work and the framework of the political sociology education emerged and developed. That framework is then applied to two prominent contemporary problems within higher education, the student loan debt crisis and the reevaluation of the purpose and value of college, to critically assess its ability both to analyze the causes and conditions of those problems as well as to provide viable solutions that support and enable democratic dialogue and engagement.

The dissertation of Belzu Gabriel Jones is approved.

Richard Desjardins

Patricia M. McDonough

Val D. Rust

James W. Wilkie

Carlos A. Torres, Chair

University of California, Los Angeles

2021

DEDICATION

My respect, admiration, and appreciation to Dr. Carlos Alberto Torres, so generous of mind, heart, and spirit, who continually shows the way for how to be fully present in this world as both critic and creator, as analyst and builder, and who continually fights the good fight for dialogue, community, friendship, and love, which is about as good an explanation as I've found of what life is for.

My deep appreciation to Dr. Richard Desjardins, Dr. Patricia McDonough, Dr. Val Rust, and Dr. James Wilkie for their kind support and their sharp yet generous comments. I admire the work of each scholar enormously and am honored and humbled to have had them on my committee.

My love to Alexis Sanderson, without whom none of this would be any fun.

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BIOGRAPHICAL SKETCH

Belzu Gabriel Jones was born in 1971 in Sebastopol, California, and moved soon after to Western Massachusetts and then Florida, graduating from Coral Shores High School in the Florida Keys. He completed a bachelor's degree in English and Philosophy and a master's degree in English, both from Northwestern University in Evanston, Illinois, in 1997, and from 1997 to 2000 he served as Academic Director of the College Preparation Program at Northwestern. He taught for six years in the Rhetoric and Writing Studies Department at San Diego State University and has also taught at the University of California, San Diego, California State University, Los Angeles, and Santa Monica College. More recently he served as Dean of Academic Affairs for the Art Institute of California - Hollywood and is currently Associate Dean of Academics at SAE Institute North America, a small group of creative media colleges across the United States and Canada. He lives in the hills of Tujunga, California, with his partner and two pit bulls.

Chapter 1: Introduction

"Only connect."
            – E. M. Forster

Research Problem

Carlos Alberto Torres has been one of the most prolific and influential theorists of

education over the past half century, having written, co-written, or edited to date over 75 books

and over 250 articles and book chapters and having served in a range of international leadership

roles within the field of comparative education. He has made major contributions to three distinct

fields – comparative education, Latin American studies, and sociology of education, and over the

past decade has made major forays into a fourth, global citizenship studies and its subfield,

global citizenship education – and played a central role in the emergence and development of the

subfield of the political sociology of education. Yet, aside from a small handful of short pieces

(Malsbary & Way, 2014; Shin & Hou, 2019; Torres, 2016) and reviews, no major study of his

work has emerged to chart and critically assess his intellectual development, theoretical

contributions, and influence in the field of education.

This study offers to partially fill that gap by providing an analysis of his body of work in

this field, focusing specifically on his role in the development and advancement of the political

sociology of education and examining the development of his thought in relation to his major

theoretical influences, including Karl Marx, Antonio Gramsci, Max Weber, Paulo Freire, Frantz

Fanon, Albert Memmi, Pierre Bourdieu, Herbert Marcuse, and Jürgen Habermas, among others.

It will also examine the historical era he lived through to understand the conditions under which

his theoretical perspective developed, ranging from his experience growing up, attending school, and teaching in Argentina during its shifts from left-wing to right-wing populism (although, in the Latin American context, the divisions between them are not quite so clear, and specific political movements often draw from both) to his experience living effectively in exile in the United States during the rise and entrenchment of neoliberal and neoconservative political and economic policies and ideologies. And, finally, this study will map his position within what has been called the "critical turn" in education (Gottesman, 2016) and, more specifically, within the subfield of the political sociology of education, for which he has been the formative and central theorist. Through an examination of his work in relation to these three concerns, the study seeks to assess his theories of the state, democracy, citizenship, and multiculturalism and their impact on education in an era of rapid globalization, especially as they relate to the emergence of his recent work on global citizenship and global citizenship education.

Specifically, this study argues that, although Torres' theoretical writings have ranged across and incorporated multiple fields and disciplines, there is a consistent through-line to his work over the past five decades, with a consistent focus on the complex and continually evolving relationship between power and knowledge – the ways that political, economic, and cultural factors influence the production and reproduction of knowledge; the ways that education, in both formal institutions and informal sets of practices, serves alternately as a hegemonic agent and site of struggle; and the ways that education can and must be reframed within a global perspective, rather than as a state-sponsored and state-governed force, to address the increasingly urgent environmental, economic, social, and political problems that humanity collectively faces. From his early analyses of theories of the state through his middle period on democracy and

multiculturalism to his most recent writings over the past decade on global citizenship education, his work stands as both an urgent call for change and a systematic effort to develop a theoretical and empirically driven model for understanding the production and dissemination of knowledge that helps advance social justice, peace, and democratic dialogue in a globally interdependent world.

By extension, this study also provides a brief analysis of the emergence of the subfield of the political sociology of education, which Torres developed by pulling together multiple theoretical strands into a multi-perspectival interdisciplinary analysis of the relationship between power, knowledge, and education. As Torres (2016) explains, his approach aims

> to understand how education – including schooling, universities, non-formal education, adult learning education, and popular education – contributes to social change, national and global development, and the betterment of nations, communities, families, and individuals. (p. 231)

Much like intersectionality, a conceptual framework that argues that the interconnections between social categories such as race, class, and gender create distinctly separate experiences of discrimination, the interdisciplinary field of the political sociology of education holds that the power dynamics that shape and are in turned shaped by educational policies, institutions, frameworks, practices, and processes, and the social changes that result from those dynamics, are most fully understood through a complex lens informed by those multiple perspectives.

Research Questions

Drawing from these elements, then, this study will focus on the following research questions:

1. How have the historical events that Torres has lived through, and his personal experience of exile, shaped the development of his thought in the political sociology of education and his understanding of the concepts of democracy, citizenship, multiculturalism, and globalization?

2. How has Torres's experience living in both Argentina and the United States during particularly fraught and complex political and economic times shaped his understanding of the construction of the individual in relation to the state, as well as to education, democracy, and citizenship?

3. What is the influence on Torres' work in the political sociology of education from earlier theoretical models from sociology, political theory, economic theory, and philosophy, and how did Torres' work develop in relation to and in response to those models?

4. What is the relationship between the literal and figurative stances of exile and of cultural, economic, and political imperialism in shaping concepts and practices of education and of the development of citizenship and democracy in Torres' work?

5. What is the relevance and applicability of Torres' work within the political sociology of education to help make sense of contemporary issues within education?

Collectively, the answers to these questions will attempt to offer an intellectual portrait of Torres, if a partial and limited one within the specific scope of his development of the interdisciplinary subfield of the political sociology of education, as well as of that subfield itself. It also presents a limited case study to explore the broader question of the relationship between a theorist's personal experience and the development of their theoretical perspective – a connection that Torres himself has frequently called attention to, most notably in his collection of interviews

with prominent educators (Torres, 1998b) that itself serves as a multifaceted argument for the importance of the relationship between the personal and the theoretical in education scholarship.

"If you scratch a theory, you find a biography"

As noted in the Research Problem section, Carlos Alberto Torres is one of the most prominent and productive educational theorists over the past half century, having made significant contributions to three distinct fields and having played a formative role in the founding and shaping of the subfield of the political sociology of education. He has held teaching posts at major universities in each of the three countries in North America and conducted educational research in twenty countries across five continents, and his books have been translated into nine languages. He has held prominent leadership roles including President of the Comparative and International Education Society and of the World Council of Comparative Education Societies as well as serving as the inaugural UNESCO Chair on Global Learning and Global Citizenship Education at UCLA. His work demonstrates considerable theoretical complexity and is deeply and widely interdisciplinary, drawing on a range of fields beyond education including sociology, economics, political theory, political science, and philosophy to help inform his understanding of the complex relationship between education and power, the consistent focus of his theoretical work. In his work in the political sociology of education over the past five decades, he has developed both a critical and constructive analysis that has systematically provided a sustained critique of the broader sociopolitical context that education is framed within and an alternative framework for education to advance social justice and multiculturalism in an increasingly globalized world.

To date, however, no study has emerged to help navigate Torres's complex and prolific body of work through a systematic account of his intellectual development and scholarly contributions. Accordingly, this project seeks to provide a contribution toward account by undertaking the first extended study of one of the most significant and influential contemporary theorists of education, focusing specifically on his writings in the political sociology of education and seeking to place his work within the broader context of the political and theoretical landscape of education as well as to understand its development within the context of his life and times and the broader intellectual landscape within which he has worked.

Although Torres' contributions to his three other major areas of emphasis – comparative and international education, Latin American studies, and sociology of education, as well as certain threads within critical pedagogy – have been significant and wide-reaching, this study focuses primarily on his work on the political sociology of education. This focus was chosen for two primary reasons: First, because that perspective serves as the theoretical lens that informs all of his work across multiple disciplines and fields, emphasizing the dynamics of power, democracy, resistance, and recognition within and through education. And second, because the emergence and development of the subfield of the political sociology of education represents an essential and signature aspect of Torres' approach, interdisciplinarity, in that he both drew together multiple theoretical strands toward its construction and development and continues to draw together those strands to inform his subsequent work within it. For the construction of his perspective, as will be explored more fully in Chapter 3, he drew upon the work of multiple theorists including Hegel, Marx, Weber, Gramsci, Fanon, Memmi, Freire, Habermas, Marcuse, Bernstein, and Bourdieu, as well as more contemporary theorists such as Michael W. Apple and

Henry A. Giroux and critical theorists of race and gender such as bell hooks and Cornel West. For his continued work, he draws upon a range of political, social, and economic research, arguing that education can only be understood within a metatheoretical and multiperspectival analysis, given its position as a complex locus of power dynamics reflecting state, economic, social, and cultural interests as well as the struggle between them for control and domination or for freedom and recognition.

Several times throughout his writings Torres has referenced sociologist Troy Duster's dictum that "if you scratch a theory, you find a biography" (Torres, 1998b; Torres, 2013a; Torres, 2014; and Torres, 2016). The phrase also serves as the guiding philosophy of Torres's 1998 collection of dialogues with leading critical educators, which explores the relationship between those educators' personal histories and the development of their critical perspectives. Similarly, in their edited collection of autobiographical profiles of leading sociologists of education, Sadovnik & Coughlan (2016) accept as a foundational principle the crucial element of biography in illuminating their work of those educators. This perspective offers the implicit theoretical argument that the work that critical educators do is to reproduce their own development of critical consciousness in their students and readers, to enable the possibilities of social change through that reproduction. It also reflects the Gramscian and Freirean argument that education in its various forms – formal schooling as well as adult education, popular education, and the antinomies of contradictory consciousness produced through cultural hegemony within democratic societies that, under the right conditions, force a Hegelian dialectical synthesis toward critical consciousness – continually presents, in addition to its role as facilitating the

reproduction of domination and oppression, both the possibility and the means for resistance against them.

Torres' own biography, recounted in part in some of his works (Torres, 2014; Torres, 2016), is itself extraordinary: growing up and attending school and college in Argentina during the turbulent years of Peronism and anti-Peronism; meeting and eventually becoming a close friend of and collaborator with the influential philosopher of education Paulo Freire, as well as becoming his first critic and biographer; fleeing his native Argentina in his mid 20s just as his academic and writing career was starting, his safety and potentially his life threatened by the rise of an authoritarian military junta and the subsequent spread of state-sponsored terrorism that was itself supported by U.S. political and economic intervention (Robben, 2007); pursuing a master's degree in self-imposed exile in Mexico at a time of considerable intellectual fervor there surrounding developing concepts of critical democracy and social justice; arriving in the United States with no prior knowledge of English to pursue a doctorate in international development education at Stanford University; changing countries yet again after graduating from Stanford to take a post-doctoral position and later a tenure-track position at the University of Alberta in Canada; and then moving back to the United States for a professorship at UCLA, where he's remained since 1990 and where, among other activities, he founded and directs the Paulo Freire Institute and served for ten years as the director of the Latin American Center, as well as holding the inaugural UNESCO Chair of Global Learning and Global Citizenship.

While evocatively raising this image of theory as a palimpsest covering its biographical source text underneath, aside from the two short pieces referenced above, Torres has largely left the connections between theory and biography implicit in his own work. This study seeks in part,

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then, to understand more fully the relationship between Torres' theoretical work and his biography – how his personal and intellectual experiences have shaped and informed the development of his theoretical framework, and how they have helped bring particularity to his theoretical perspective. Having lived through a period of unrestrained – and, significantly, U.S.-sponsored – advancement of neoliberal economic policies in Argentina in the 1970s, having observed and experienced the violence perpetrated in support of those policies, and having seen the enormously destructive and traumatic impact they had not only on his native country's economy but, even more tragically, on human life and on the nation as a whole (Gordon, 2008), Torres experienced directly the oppressive power of the state in both its abstract and concrete forms. His subsequent arrival in the United States in 1980 coincided with the election of Ronald Reagan, whose administration ushered in an era of neoconservative and neoliberal economic, domestic, and foreign policies that grew over the ensuing decades to reshape the sociopolitical landscape of the United States and the world. The double-edged sword wielded by his new home country of imperialist capitalism advanced by his new home country – one that had welcomed him and provided much-needed financial support, but also, in its advancement of imperialist capitalism in his native country and throughout much of Latin America through brutally harsh structural adjustment policies and the support of right-wing terrorism to protect its economic interests, had also financially supported the dismantling of democracy elsewhere in the world – demonstrated in action the Gramscian pairing of coercion and consent in the maintenance of modern capitalist democracies. Together, these two milieus comprise the major formative experiences that shaped Torres' sociopolitical and socioeconomic perspective, which have in turn shaped his theoretical perspective.

This experience was not the initial impetus of his intellectual development, however. By the time of the military junta's 1976 coup d'etat in Argentina he had already graduated with a bachelor's degree in sociology from the Universidad del Salvador in Buenos Aires with a strong grounding in political sociology – the critical analysis of how power, domination, and oppression operate within a society and determine social relations and social behavior – and was teaching classes with texts by Freire and Marx; dangerous works, he soon learned, that indicated resistance against the advancing neoliberal order and that would likely have brought the dangerous and even deadly attention of the authorities had he not left for Mexico on the advice of a friend (Torres, 2014).

This experience provided a stark demonstration both of the state's violent use of power to ensure the protection and reproduction of its political and economic interests and of the complicated and troubling relationship that the United States has maintained throughout its history between the rhetoric and reality of freedom both domestically and internationally, as well as the impetus to what became a lifelong perspective of exile – not only literally, as he was unable to visit his native country until years later after the fall of the military junta, but figuratively, as this physical displacement creates an even deeper psychological perception of displacement. The perspective of exile often permanently reconstructs one as an "other" in relation to all homes, both old and new, and can instill a need for connection that one is driven to perpetually seek but rarely if ever can entirely fulfill due to that profound sense of loss. The experience also powerfully reinforced his understanding, shaped by his early reading of Marx, Weber, Gramsci, and Freire, of the role that public institutions and practices play in disciplining subjects and in serving the interests of the state toward social, political, and economic

reproduction. This power plays out through multiple channels – both through the overt coercive use of force by the state as well as through the more subtle and less visible persuasive and manipulative operations of cultural hegemony to manufacture the consent of the governed through the creation and reproduction of "common sense." These power dynamics will be explored more fully later in Chapters 3, 4, and 5.

Given the extent of his work more broadly within the domains of social, cultural, and political theory, Torres may appear to be an anomaly in his field – a comparativist and sociologist of education whose focus often seems to be nearly everything but education. In part this approach reflects the influence of founding figures of comparative education such as Isaac Leon Kandel, Franz Hilker, and George Z. F. Bereday, who each sought to understand the structure, role, and effects of education through the broader lens of political, social, and economic conditions. Similarly, from the perspective of the critical sociology of education, Torres draws on the theoretical influence of Marx and critical theory more broadly as well as the work of Paulo Freire, Antonio Gramsci, and Pierre Bourdieu to understand education, historically, as largely a system designed for social reproduction to maintain and serve dominant political and economic interests, but, as Morrow & Torres (1995) argue in their influential book to restore the potential liberative value of theories of reproduction within the discourse of sociology of education, also a site of struggle and resistance with the potential to develop counter-narratives against those dominant interests. As such, education is simultaneously symptomatic of, reflective of, and an instrument of broader systems and forces, a locus for the dialectic of domination and resistance, requiring an analysis of those systems and forces and of that dialectic to understand the shaping and effects of educational systems, institutions, and processes themselves.

Carrying on Freire's mission, a major element of Torres' work is an examination of the broader political, social, and economic conditions under which domination through education is maintained or liberation through education is made possible. Power dynamics are an inherent part of the educational process, from the decision of what and whose knowledge and skills are to be passed on to the hierarchy of administration, teacher, and student to the inculcation of patriotism and the "right" beliefs, values, and norms that one should hold to be a proper and well-adjusted member of society. Education is also always a locus of competing forces between structure and agency as well as between the reproduction of dominant interests and reproduction of counter-interests. Building on these traditions, then, Torres brings together theories of the state, citizenship, democracy, globalization, and multiculturalism toward an understanding of how the individual is educated, in the broadest sense, in context by these collective forces. Similarly, his work incorporates a broad range of critical theories, including feminist perspectives and other approaches to diversity and inequality – an especially important critical intellectual catholicism in a time when critical theory in education, as Gottesman (2016) argues, has grown increasingly insular and atomized.

As a political sociologist of education, then, Torres is primarily concerned with the political context that shapes the educational environment – and so looks at the political, social, and economic conditions in which education and both its formal institutions and informal processes operate. Torres takes a metatheoretical approach to understand how the concepts of citizenship, the state, and democracy have been formulated, and how they in turn shape concepts of identity and the individual. These concepts in turn shape the institutional nature of education and thus the practice of education. Accordingly, in this formulation, formal education serves as

an epiphenomenon to these larger phenomena that shape educational institutions and practices –

a reworking of Marx's base-superstructure model, updated to reflect the more complex interplay

of political, social, and economic forces that determine the "common sense" that informs

educational policy and practice. As Torres (2016) himself notes, the political sociology of

education is a necessarily interdisciplinary field, one that must escape the same intellectual

capture of working within a tradition defined by the very hegemony it attempts to resist and

critique by drawing from a range of theoretical perspectives.

Influenced by Gramsci, Torres draws a sharp distinction between *education* and

schooling, building in particular on the perspectives of conflict theory and social reproduction

within the sociology of education. *Education* encompasses all the environments, practices, and

processes that shape an individual's identity and consciousness, while *schooling* is largely an

instrument of the state, paid for and administered by the state to meet and reproduce its own

interests. In effect, it can be argued, all education is state-sponsored education, even if in many

cases it is financed privately, since in one form or another it is still governed or administered by

the state through regulatory and/or accreditation agencies to ensure that state needs and

requirements are being met, increasingly often related to the neoliberal-influenced emphasis on

credentialing and employable skills. As a result, students who are the product of this system are

inevitably deeply shaped by its particular framing of citizenship, democracy, and individualism,

as well as of the value and meaning of education and knowledge and its relationship to concepts

of productivity and value.

These ideas will be explored more fully in applied analyses in Chapter 5, but, as a brief

example of the neoliberal state's complicated and evolving sense of control over education, a

recent trend within educational policy is the push toward privatization in two different and problematic forms: the increase of tuition and fees (privatizing the role of funding for education, which counters the historical move toward compulsory, inclusive, and universal education that many progressive educators have called for; and the school voucher movement, which in effect privatizes public education. The latter move is provocatively tied to the recent epistemological shift away from trust in expertise that has affected public perception of nearly all fields, as noted by Nichols (2017). If either move toward privatization succeeds, the role and idea of mandatory public education in the construction of the citizen will be dramatically altered, and while this might appear to limit the power of the state to directly influence educational practice, it reflects a deeper ideological move toward the instrumental rationality of neoliberalism. Within this new framework, the state's power and interests are redirected from the liberal values of equality and democracy, and in particular from the progressive values of social justice and equity, and instead toward the prioritization of economic interests as the governing determinant of educational value and of the role of the citizen within the state.

Given this context, this study in part focuses on Torres' understanding of the roles that state and private powers play in shaping educational practice and, therefore, democracy and the construction of the individual. As Torres writes,

> Though a political sociology of education has intimate connections with a sociology of
> education in the conventional sense (with questions of equity, efficiency, equality,
> mobility, and so on), its center of attention is an emphasis on questions of power,
> influence, and authority, and its goal is to explain the process of decision making and
> educational planning at several levels. (2016, p. 246)

The governing concern that runs throughout all of Torres' work is the relationship between power and education, and the ways that education can either be used as a tool for power and domination upon individuals to shape them according to the needs and interests of the state, or as a tool for power by individuals toward liberation and a more expansive sense of community, solidarity, and equality. As he explains, his work both

> offers a conceptual and synthetic review of the notion of social and cultural reproduction in education and advances new directions for theoretical and empirical research in the sociology of education. Theories of social and cultural reproduction rest on the argument that schools primarily reproduce the functions required by the economic system. Thus, rather than providing a tool for changing society by reducing inequalities, schools reproduce and legitimize the social order. After a careful synthesis, analysis, and criticism of several sociological theories, including functionalism, structuralism, system theories, and Marxism, my colleagues and I have advanced an agenda for research and policy, including discussions of the interactions among class, gender, race, and social reproduction in the context of the postmodernist critique. (2016, p. 246)

As agents of social reproduction, schools operate within the larger context established by political and economic systems and serve to maintain, legitimate, and perpetuate those systems. Their capacity to enable social change, or provide an environment that allows it, is severely limited by that context for both macrosociological and microsociological reasons – at the macro level, these reasons include state and federal funding (which are often tied to specific metrics that schools must achieve to maintain funding or avoid),

state and national curriculum standards, and regulatory requirements; at the micro level, they include parental expectations and demands, community pressures, and employment decisions that can prevent or curtail teachers' ability for and interest in working toward social change at the expense of their own professional and financial security – as well as the broader social and cultural forces of reproduction that influence students' own willingness to participate in the work toward critical consciousness and change.

In light of Torres' relationship with Paulo Freire – he was Freire's first biographer and critic as well as a close friend from the mid-1970s until Freire's death in 1997, and has returned to Freire frequently throughout his career as a source of inspiration and insight – the research agenda of the political sociology of education is particularly significant in that it addresses a major *absence* within Freire's work. Freire is perhaps best known for his critique of the "banking model of education," which positions students as empty vessels into which the teacher deposits knowledge. This banking model writes over the knowledge and experience that students bring and ignores the cultural perspective and context they come from unless it mirrors those that that banking model seeks to reproduce. Freire argues instead for a dialogic exchange between teachers and students that attempts to overcome or erase the hierarchical dynamic that traditionally frames their relationship, replacing it with a more equitable one that includes and encourages multiple points of view toward the construction of knowledge and seeks to develop more communally informed and constructed perspectives through that dialogue.

While attentive to the philosophical and historical context that conditions the engagement between teacher and student from a pedagogical perspective, however, Freire

does not provide a critical sociological analysis of the banking model of education – that is, the political, social, and economic factors that shape the systems that reproduce the banking model to serve specific interests of power. Torres' political sociology of education extends and complements Freire's work by providing that analysis from both a macrosociological and microsociological perspective to understand how the conditions and environments of education are influenced and governed to reproduce the interests of power or to produce the possibility of resistance against and liberation from those interests.

This study, then, also partly understands Torres' work as a systematic fulfillment of Freire's exhortation not to repeat but to "reinvent" him (Torres 2014, 120). In many ways his work can be seen as an updating of the Freirean project for the twenty-first century, addressing more recent developments such as the advancement of globalization and the encroachment of neoliberalism in political, economic, and education policy and practice. Yet Torres is not simply a disciple of Freire – reinventing Freire means not simply reworking and reapplying his ideas but rather establishing and advancing a new understanding of the relationship between education, power, freedom, and social justice, one in which the concept and practice of education is contextualized and shaped by political, economic, social, and cultural factors, and of how the individual is in turn shaped and empowered or disempowered by those factors.

Citizenship and the Pedagogical Subject

The individual as pedagogical subject – as the object of education in both its formal and non-formal settings – is a primary unit of analysis in Torres' works, although not always made explicitly so. Yet, in works ranging from an encyclopedic critique of theories of social and cultural reproduction and their relationship to education (Morrow & Torres, 1995) to a comprehensive analysis of theories of democracy, the state, and multiculturalism (1998), to his more recent work on globalization (2009), neoliberalism (2011), and global citizenship (2017), his focus, whether explicit or implicit, is on how the individual is constructed through the educational process, whether sponsored by the state toward becoming a "useful" citizen, with that "use" becoming increasingly defined in economic terms, or by non-formal educational practices and environments that allow for the emergence and development of both critical consciousness and of a sense of genuine citizenship in an increasingly globalized and interconnected world. As he argues in one of his central works,

> The construction of the pedagogic subject is a central conceptual problem, a
> dilemma for democracy. To put it simply: democracy implies a process of
> participation where all are considered equal. However, education involves a
> process whereby the "immature" are brought to identify with the principles and
> forms of life of the "mature" members of society. Thus, the process of
> construction of the democratic pedagogic subject is a process of cultural
> nurturing, but it also involves manipulating principles of pedagogic and
> democratic socialization in subjects who are neither tabula rasa in cognitive or
> ethical terms nor fully equipped for the exercise of their democratic rights and

obligations. Yet in the construction of modern polities, the constitution of a

pedagogical democratic subject is predicated on grounds that are, paradoxically,

both a precondition and a result of previous experiences and policies of national

solidarity (including citizenship, competence building, and collaboration). (1998,

p. 11)

In this process, the pedagogic subject becomes more a pedagogic object: a construction

manufactured through nurturing, manipulation, coercion, persuasion, discipline, and control in

order to become ultimately an agent for the continuous reproduction of the values and interests

of the state, whose consciousness reflects that of "national solidarity." In this framework, the

individual is constructed or co-opted by political, economic, social, and cultural forces, in

particular through the process of schooling, to serve interests external to and separate from their

own – or, often more precisely, to align their own interests with those external interests. Torres'

work, then, aims to understand the construction of the individual within the political economic

context that education is framed within, and the factors that influence the dynamic within the

educational environment itself.

Torres takes from Freire a deep suspicion of educational institutions and takes from his

personal experience as well as from his analysis of comparative models of education a deep

suspicion of the state and of its intentions with education. Further, his concept of education as

schooling, as institutional practice, is deeply shaped by his reading of Marx, Weber, and

especially Gramsci: "Educational systems, and schools in particular, appear as privileged

instruments for the socialization of a hegemonic culture" (1998, 13). In the traditional Marxist

formulation, education is the superstructure to the base of the forces and relations of production;

as a result, education is unlikely to serve as the route to freedom without a change to the forces that shape, influence, and reproduce it. Educational institutions – schools, colleges and universities, adult education – are not the vehicle for empowerment but, largely, mechanisms for the reproduction of state ideology, ultimately represented and manifested as "common sense." This concept of hegemony or "common sense," in which the terms of both public discourse and individual consciousness are shaped by and reflective of governing economic and political interests, is one that Torres applied and developed further in his sustained and systematic critique of neoliberalism as the new "common sense" shaping ideas of democracy and education in contemporary life (2011, 2013b). This understanding of hegemony and "common sense" is also closely associated with Foucault's concept of *epistemes,* or "regimes of truth":

> Each society has its regime of truth, its 'general politics' of truth: that is, the types of discourse which it accepts and makes function as true; the mechanisms and instances which enable one to distinguish true and false statements, the means by which each is sanctioned; the techniques and procedures accorded value in the acquisition of truth; the status of those who are charged with saying what counts as true. (1980, p. 131)

This is not to argue that education is inherently and inescapably an agent of social reproduction and an instrument of the state, however. Torres' collective works on education aim to understand education as a mechanism of power both *on or against* as well as *for* the individual, and his work has followed two major avenues of thought, critical and constructive, that carry on the tradition of critical theory in both critiquing and analyzing social conditions as well as offering alternative frameworks that open expanded possibilities for democracy and freedom. While providing a thorough critique of schooling as largely an agent of instrumental

rationalization, as a function of social reproduction, and as a means for maintaining political, economic, and social order, then, he has worked to provide a positive alternative model through an enhanced, escalated version of Freirean non-formal schooling through his theories of democratic multicultural citizenship and, later, global citizenship. As Torres explains his project,

> The research agenda of a political sociology of education includes studying the relationship between education, the state, and power; the role of schooling in social and cultural reproduction and education as a contested terrain with multiple dynamics, contradictions and controversies; the role of social theory in comprehending the nature and conflicts in contemporary education; the multiple faces of globalization and its diverse impact in the lives of teachers, schools, and educational policies; the interconnections between citizenship building, multiculturalism, and democracy both at the level of the regions and nation-states and at the global level as intended in global citizenship education, and particularly considering the new reality of our lives, growing immigration; the ways that a democratic restructuring of schooling involves engaging the dialectics of the dynamics and spheres of gender, race and ethnicity, and class in constructing cultural sensitive pedagogies that promote agency, solidarity, respect for difference, and ultimately create a more just and democratic society; and the contributions of critical studies in education to transforming education and democratizing society. (2016, pp. 247-48)

The State of Exile and the State of Reproduction

It is here that Torres' experience in exile is illustrative for both biographical and theoretical reasons. Torres' work in the political sociology of education provides two key lines of thought: a sustained critique of the forces of instrumental reason that act upon the institutions and practices of education, primarily serving the reproductive needs of the state, and the systematic construction of an alternative concept of multicultural global citizenship that encompasses in turn an alternative concept of education – ultimately, education as the practice of rule-learning, socialization, and reproduction versus education as the practice of freedom in the Freirean sense. These two lines of thought can arguably be seen as the central frame of Torres's work, and the thread that ties his biographical influence to his theoretical perspective: the opposition of cultural imperialism and exile on the one hand, and the search for utopia – in its pragmatic theoretical formulation, the construction of idealized possibilities that, while never reached, enable movement toward more democratic possibilities – on the other.

The exile, in Torres' formulation, becomes paradoxically a position of freedom and insight. As he quotes Freire,

> For me, the exile was profoundly pedagogical. As an exiled [sic], I took distance from Brazil, and began to understand myself and Brazil better. . . . In the moment that you say no to yourself, in any moment, to make value judgments, you begin to learn a virtue that I consider so fundamental in this country: the virtue of tolerance. Tolerance that teaches us, overcoming all preconceptions, how to live together with the different, for in the end, to better struggle with the antagonical. (Torres, 2014).

Whereas cultural imperialism treats the other either as something to be erased or as a blank slate on which to impress copies of itself, the exile, by force and by nature, learns to make allowances for the other, and, in a neo-Hegelian dialectical sense, comes to know oneself in the process. Reflecting on his own experience in exile, Torres explains:

> It seems paradoxical but the experience of exile is a profound experience of learning. In exile I managed to navigate the complexities of public policy and education using as a backdrop of theories of the state and theories of legitimation. . . . I completely concur with Freire's conclusion of exile: "One thing I also learned in exile, maybe the best thing I ever learned, is that I could not continue being sure of my certainty." (2016, p. 237)

The theoretical position of the exile is contrasted, then, with the act of social and cultural reproduction. In its most reductive formulation, the cultural imperialist treats the other as a blank slate to impress copies of himself, without seeking to know the other. As Torres explains,

> Freire understands cultural invasion as the penetration, in any society, of a foreign culture that imposes its way of seeing the world: '[Cultural invasion] is the penetration of the invaders in the context of the invaded, without respecting their potentiality to be, imposing their view of the world, breaking their creativity, and inhibiting the expansion of the invaded people." (2014, p. 5)

The contrast between exile and social reproduction becomes both a theoretical and, in some cases literal, life and death struggle. In a sense, Torres' body of work can be seen as a sustained resistance against cultural invasion and reproduction and as the elevation of the theoretical view of the exile – a figure of global citizenship who, by force of displacement, comes to understand oneself more deeply through confrontation with and acceptance with the other. The exile's stance

connects as well to Torres' literal and theoretical border-crossing, bringing together multiple disciplines to help inform a deeper and more complex understanding of the political, social, and economic context of education.

This openness to the other, both the human other and the possibilities of otherness, also helps explain the increasingly important role that literature has played in the development of Torres's theoretical perspective, as suggested in Torres & Teodoro (2007), especially as he's moved in his late work increasingly toward the development of systematic theories of democratic multiculturalism and global citizenship: Literature provides a utopian impulse similar to theory both to imagine the world through another's eyes, and to imagine the world otherwise.

In that spirit, Duster's adage can also be flipped on its head: Scratch a biography and you find a theory. On the one hand, this simply describes the relationship between theory and praxis – that is, that theory must inform and drive action, and action must itself be driven by theory, which is of course a tautology; everything has theory behind it, even if that theory is not always explicit or conscious. Torres, influenced by Freire, looks to make the underlying theory conscious, examined, critiqued, understood, and analyzed, and then embodied and lived.

Similarly, "scratch a biography and you find a theory" accurately represents Torres' critiques of formal education and neoliberalism, which each produce a "common sense" that shapes the identities of individuals who grow up and live within the environments they help create; in many ways, the institutions and practices that they govern limit and even determine the choices people make, bending lived experience to the nature of the theory that guides it. Yet, this also provides some degree of hope, by displacing the reproductive models of globalization and

neoliberalism that shape contemporary educational practice with a theory of global citizenship

that can contribute meaningfully to social justice.

Methodology

This study will approach the development of Carlos Alberto Torres' thought in the

political sociology of education through three lenses:

1. A brief review of the political, political, and economic conditions during Torres'

    formative years that informed and shaped his perspective on the political, social,

    and economic context of education

2. A theoretical analysis of key concepts used by Torres to develop an understanding

    of the political sociology of education, drawing from several of his works

3. An application of Torres' model of the political sociology of education to two

    contemporary problems within education to demonstrate how it can both critique

    current conditions and provide possible solutions

This approach seeks to assess the place of Torres's work within the broader context of the

field of sociology of education, identifying his major works, concepts, themes, and lines of

thought that contributed to the formation and development of the political sociology of education

and understanding it in relation to other major contributions to the broader fields of both political

sociology and sociology of education and to the theoretical perspectives that shaped them.

Through this examination, this study seeks to understand the ways that Torres has formed,

influenced, and advanced the field of the political sociology of education, as well as the areas of

his work that have received less attention. This dialectic between the margins and the center,

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which is central to both the larger field of sociology of education as well as to Torres's own work, can also help to illuminate the relationship between Torres's theoretical writings, the advancement of the field of sociology of education, and the formation and development of the subfield of the political sociology of education.

A broader critical and analytical assessment of Torres' biography, work, and impact would benefit from interviews with his collaborators, colleagues, students, and critics, but due to limitations of time and resources, this study will focus on the work and theoretical perspective and on their historical and theoretical contexts, with the goal of incorporating that broader socially contextualized approach in a follow-up study for potential publication.

Literature Review

The literature review, which partly constitutes and informs Chapter 3 and Chapter 4, focuses on three contexts. The first context offers an exploration of the development of Torres' thought as shaped by the major intellectual influences from political and social theory during his years of undergraduate and graduate study. The second context provides a review of the major themes and works within the academic and intellectual milieu of the sociology of education from the 1970s to the present day in order to frame Torres' work and thought within that broader context, with a particular emphasis on the critical turn within sociology of education. These two sections will be the focus of Chapter 3. The third section, comprising Chapter 4, will focus on major concepts that inform and demonstrate Torres' theoretical perspective in order to chart key points in the development of what this study identifies as his two-part theoretical framework, comprised of:

1. A systematic critique of the operations and effects of modern capitalist democracy on the environments, institutions, and practices of education and on the construction of the individual within and through those environments, institutions, and practices; and

2. A construction of an alternate model of citizenship that can reshape the practice of education toward a more inclusive, just, and equitable condition.

Torres' published work, spanning over 75 books and over 250 articles and book chapters across three languages, runs to more than 20,000 pages, making it impossible to address its full breadth and depth in this analysis. Similarly, the enormous range of his theoretical perspective, deeply informed across multiple fields and disciplines and influenced by dozens if not hundreds of theorists and researchers, makes it difficult to provide more than a narrow vista from which to understand that perspective. Instead, this study will emphasize a necessarily sharply abbreviated list of only the most profound theoretical influences on his work, as well as a select list of his most prominent and influential works within the political sociology of education along with a review of central concepts that inform and drive those works.

Within that very narrow framework, then, Chapter 3 will explore the theoretical context that informed the development of Torres' perspective, including Karl Marx, Max Weber, Antonio Gramsci, Paulo Freire, Frantz Fanon, Albert Memmi, Herbert Marcuse, Pierre Bourdieu, and Jürgen Habermas, to understand how that perspective was shaped in the construction and development the political sociology of education as an interdisciplinary theoretical lens through which to understand the relationship between power and social groups, movements, and behaviors in the formal and non-formal education of citizens within the state. The chapter will

also provide a brief account of the academic context in which the political sociology of education

arose along with some of the major theoretical perspectives that informed the subfield and served

as the intellectual milieu in which Torres has worked from the 1980s to the present, including

Pierre Bourdieu, Michael W. Apple, bell hooks, Henry A. Giroux, Roger Dale, and Samuel

Bowles and Herbert Gintis.

 Chapter 4 will focus on central concepts and ideas from Torres' work, emphasizing select

key publications and arguing that they collectively provide an understanding of the theoretical

framework for his constructive critical analysis of democracy, citizenship, and education in both

its narrow and broader senses. This is not to say that the work he has produced prior to or outside

of this selection is insignificant in comparison – for example, his co-edited volume on

comparative education (Arnove, Torres, & Franz, 2013), with its fifth edition forthcoming, is

widely regarded as an essential text within the field of comparative and international education,

and a number of his works show hundreds of citations[1] – but, rather, that these select key works

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[1] Although impact factors are themselves troubling products of the instrumental reason and academic capitalism that Rhoads & Torres (2006) critique, they are nonetheless worth considering to quantitatively assess the influence that Torres' work has had across multiple disciplines and fields. According to Google Scholar, as of this writing Torres has a total of 19,515 citations, with 6,684 since 2016; his citations have grown consistently each year since 2010, reaching a high point in 2020 with 1,267 citations as of September 10, 2021. Torres' h-Index, which its creator defines as "an estimate of the importance, significance, and broad impact of a scientist's cumulative research contributions" (Hirsch, 2005, p. 16572), is 63 overall, and 34 since 2016. Hirsch (2005) explains that:

 i. A value of $m \approx 1$ (i.e., an h index of 20 after 20 years of scientific activity), characterizes a successful scientist.
 ii. A value of $m \approx 2$ (i.e., an h index of 40 after 20 years of scientific activity), characterizes outstanding scientists, likely to be found only at the top universities or major research laboratories.
 iii. A value of $m \approx 3$ or higher (i.e., an h index of 60 after 20 years, or 90 after 30 years), characterizes truly unique individuals. (p. 16571)

Considering that nearly all of Torres' citations have come within the past 20 years, this assessment indicates that Torres might fairly be placed within this third, truly unique category. Further, his h-Index over the past 5 years alone already places his work within the second category, normally reserved for an assessment of productivity over four times as long.

Finally, Torres' i10-index – a measure devised by Google Scholar that simply counts the number of publications with at least 10 citations – is 195 overall and 104 since 2016, meaning that he has had nearly two hundred

constitute the major points or milestones of the development of his system of thought organized around the relationships between democracy, capitalism, the state, multiculturalism, globalization, and education, ultimately to understand the shaping of the modern democratic pedagogic subject and the forces that work upon them as well as the power they're afforded – or deprived of – through the effects of these forces.

Below is a very brief summary of the key major works that inform the perspective of this study:

1. ***Social Theory and Education: A Critique of Theories of Social and Cultural Reproduction* (Morrow & Torres, 1995)** provides an encyclopedic exploration and critical analysis of major theories of social and cultural reproduction that seek to explain the role that education plays as both site and agent of reproduction. The book also served as a major intervention within the sociology of education that corrected the then-dominant and overly deterministic critique of social reproduction that failed to recognize that many aspects of reproduction are valuable and meaningful for people, providing the possibility of stability, coherence, and connection in the formation of identity and social relations. This perspective updates the Hobbesian argument that people voluntarily relinquish some freedoms in order to join the state because the security that the state provides is preferable to the cold freedom that the state of nature provides; similarly, the security that reproduction provides is often preferable to the cold freedom that some aspects of reproduction's resistance provide. The potential for schools to enable radical change is necessarily limited, contrary to some arguments coming from critical

publications over the course of his career, and over one hundred publications over the past five years alone, receive 10 citations or more. Collectively, these numbers indicate a very significant scholarly impact.

pedagogy, because they serve as planned sites for social and cultural reproduction, often replacing or superseding the role of the family and church in modern societies, but these are not necessarily negative outcomes. Other, more non-formal and less state-regimented forms of education in the broader sense must instead serve as the contexts where radical transformation can occur.

2. ***Democracy, Education, and Multiculturalism* (Torres, 1998),** in many ways Torres' most important and influential book, offers a striking combination of deeply personal reflection with complex and sophisticated theoretical analysis, displaying Torres' emphasis on ways that biography and theory inform each other. It also employs a signature technique that characterizes many of Torres' works, drawing inspiration from literature with an evocative phrase from the Argentinian writer Jorge Luis Borges – "the secret adventures of order" – that offers a framework for understanding the hidden ways that the state establishes and reproduces order within capitalist democracies. The book discusses and critiques a wide range of theories of the state, globalization, citizenship, democracy, and multiculturalism and explores the relationships between these concepts in order to demonstrate the limitations and challenges they present in his effort toward achieving his primary goal of a theory of multicultural citizenship. Most theories of democracy, he argues, while relying on the stirring rhetoric of freedom, justice, and equality, have historically been unable to prevent the systemic oppression and disenfranchisement of entire groups of people. Similarly, theories of citizenship tend to rely on models of homogeneity and assimilation at the expense of cultural identity and difference, which are vital for both the integrity and recognition of the self and one's

sense of belonging as well as the potential for the state to evolve. Theories of multiculturalism, while offering a progressive vision of inclusiveness and social justice, are unequipped to operate within the realities of contemporary capitalist democracies.

Meanwhile, the rapid expansion of globalization throughout the latter half of the twentieth century placed significant constraints on the state's ability to maintain autonomy and sovereignty, which has enormous implications for citizenship. The state for Torres has been the primary pedagogical agent within modern societies, as well as the primary site of political and social struggle for dominance, equality, and recognition. Globalization, by diminishing the autonomy and sovereignty of the state, serves as a chaos agent that compels new forms of political organization that determine the relationship between power, capital, states, and citizenship and thus a new form of education that shape the citizen's understanding of their identity, their social relations and connections, and their place in the world. Within this context, however, schools and the broader arena of education remain a vital force in the maintenance of democratic discourse. This latter concept is of crucial importance within Torres' theoretical framework and the linchpin to a healthy society, which depends on its ability to produce citizens who are equipped to engage in good faith as equals in democratic dialogue – itself a notion of praxis influenced by Freire and Habermas – to collectively determine the shape and course of that society. Nearly 25 years on, this book remains one of Torres' most important and influential texts in providing an analysis and a framework for a progressive theory of multicultural democracy that he would continue to work within and develop in later works.

3. ***Reading Habermas and Freire: Critical Pedagogy and Transformative Social Change*** **(Morrow & Torres, 2002)** identifies both theorists within the ontological tradition of critical realism in rejection of the more recent trend of postmodern subjectivity. The book then seeks to explore the connections between them through three primary threads that constitute each thinker's theoretical model for social transformation: An emphasis on the role that domination plays in closing off democratic dialogue, the emancipatory power of democratic dialogue, and the need for political environments to ensure that individuals can engage in this dialogue on a relatively even playing field. The book also locates Freire more prominently within the critical tradition and demonstrates the connections between European and American critical theory with the critical perspective emerging from Latin America in the 1960s and 1970s, serving implicitly as an argument to consider Freire as an honorary member of the second, more optimistic and hopeful generation of the Frankfurt School in its critical analysis of power and society, and its exploration of the possibilities of dialogue and communication to enable social transformation toward justice and equality.

4. ***The University, State, and Market: The Political Economy of Globalization in the Americas*** **(Rhoads & Torres, 2006)** provides a critical survey of the complex dynamic between universities, states, and economic markets as a result of the advancement of globalization and neoliberalism, and in particular the market rationalization of academic practices and production.

5. ***Education and Neoliberal Globalization*** **(Torres, 2008),** which provides an analysis of how democracies in the late 20th and early 21st centuries shifted increasingly toward a

neoliberal socioeconomic model, and how educational practice in turn has come to justify, legitimate, perpetuate, and advance that model, where education as an extension of the state reflects and reproduces its nature and values around the interests of capital accumulation at the expense of the civil sphere.

6. ***Globalizations and Education* (Torres, 2009),** a collection of key essays written over the preceding 30 years that in particular includes Torres' developing work on theories of globalization and multicultural citizenship, in particular exploring the impact that globalization in its various forms has had on the role of the state and its relative autonomy as a political actor, as well as the role of education both within the state and within the globalized world. Education in this context refers both to the formal process of schooling and the institutions, especially in higher education, that provide it, but more broadly the non-formal pedagogical effects of globalization and the state in shaping citizens' understanding of their identity, agency, autonomy, and positionality both within state and within the globalized world, especially insofar as it provides the capacity to act toward social change to address the increasingly pressing problems of global environmental catastrophe due to neoliberal policies and practices.

7. ***First Freire: Early Writings in Social Justice* (Torres, 2014),** an assessment of the early works of Freire that serves also as a lens to understanding the trajectory of Torres' own development. This book is especially crucial within Freirean studies in that it offers an interpretation of Freire's project in contrast with the more common view of him as a revolutionary Marxist (e.g. who used the practice of critical pedagogy to achieve radical political and social transformation. Torres instead situates Freire within the broader

Western intellectual tradition, identifying the influence of a wide range of philosophers and social thinkers, including Hegel, Husserl, Gramsci, Fanon, and Memmi that Freire drew upon to construct his own project.

8. ***Theoretical and Empirical Foundations of Critical Global Citizenship Education (Torres, 2019b),*** Torres' first major statement of his theory of global citizenship, which continues to be a major focus of his current research. In many ways this serves as an update and extension of his seminal 1998 book on democracy, education, multiculturalism, citizenship and globalization, as the processes of globalization have accelerated in the intervening decades and the dilemmas of global citizenship have increased. The traditional and formal institutions of education are inadequate to effectively address the increasingly urgent problems of the globalized world, not least because those institutions are historically and structurally tied to the state. The state itself has seen its power and autonomy diminished due to the effects of neoliberalism, which seeks to undermine government oversight and regulation that restrict the accumulation and flow of capital, as well as certain aspects of globalization that privilege international trade and relationships over national sovereignty. Although the capacity of the capitalist state to address problems of democracy including representation, inequality, and injustice has always been curtailed due to its principal role in the reproduction of the interests, practices, and values of the ruling class, globalization brings new challenges for concepts of citizenship and democratic multiculturalism as well as new urgent problems to address, including the rapid erosion of democracy and the threat of global environmental collapse. These concerns demonstrate the need for the concept and practice of critical global

citizenship, which brings the Freirean concept of *conscientization,* or critical

consciousness, to understanding one's place in the world and one's obligations and

relations to others and to nature.

The study will also be informed by autobiographical sketches that Torres has provided in

several works including *Education, Power, and Personal Biography* (1998); "The Making of a

Political Sociologist of Education" (2016); and his autobiographical chapter in *First Freire*

(2014), as well as biographical sketches provided by others, to understand both the relationship

between his personal experience and the development of his thought as well as the relationship

between his theoretical framework for education and his practice as an educator.

Conclusion

As Sadovnik & Coughlan (2016) write in the introduction to their collection of

intellectual self-portraits of sociologists of education, itself guided implicitly by the spirit of

Duster's adage "scratch a theory, find a biography," "Marx, Weber, and Durkheim (the 'founding

fathers' or 'holy trinity' of sociology), each in their own way, was driven by an appraisal of and

attempt to remedy the malaise engendered by modernity: alienation, inequality, hyperrationality,

domination, anomie" (2). This spirit of an appraisal and an attempt to remedy the malaise of

contemporary modernity animates Torres' own work, updated to the current conditions of

globalization, democratic capitalism, neoliberalism, and multiculturalism. Much of Torres'

scholarship has been focused on the critique of existing theories of these concepts for their

limited ability to achieve the utopian goals of democratic multiculturalism and social justice – his

research agenda has often focused on clearing up theoretical confusions and dead-ends in order to clear the space for the possibility of open dialogue between theories, and between actors operating within and embodying those theories, in order to construct dialogically a new, more just and humane understanding of how to live justly and peacefully in the world.

The most essential and defining quality of Torres' work, however, has been his role as a *connector* – of ideas, theories, and systems as well as projects and people. Torres' primary contribution to both political sociology and the sociology of education is as a synthetic thinker and theorist, drawing complex connections between disparate fields to identify and explore the new insights and perspectives that those connections allow. He has similarly emphasized collaborative work throughout his career with other prominent scholars as well as students – many of his most important works have been co-written or co-edited (Arnove, Torres, & Franz, 2013; Tarozzi & Torres, 2016; Torres & Teodoro, 2007; Rhoads & Torres, 2006; Morrow & Torres, 2002; Morrow & Torres, 1995; O'Cadiz, Wong, & Torres, 1998), in addition to his editorship of *The Wiley Handbook of Paulo Freire* (2019), with contributions from over 40 authors including former students of his who are now in prominent academic and research positions of their own as well as noted scholars of Freire and critical pedagogy. Another prominent example of this collaborative approach is his collection of interviews with prominent critical educators (1998b), demonstrating as part of his professional practice a Freirean dialogical approach in his own scholarly output that embodies and enables a process of mutual learning and co-production – knowledge and understanding are produced dialogically and collaboratively. This aspect of connecting and networking, then, also plays a significant role in helping to understand the impact that his work has had within the sociology of education. It is also striking

given Torres' own background as a self-imposed exile who managed to survive the rise of the

New Authoritarianism in Argentina and throughout much of South America, leaving behind not

only one's familiar cultural environment but also the networks of solidarity, friendship, and

family and instilling the need to create roots and branches in each new location he found himself.

Chapter 2: Scratching a Theory

This chapter will explore the broad historical and biographical context that shaped Torres' perspective, including a brief history of Argentina's political and economic conditions from the early 20th century through the mid-1970s, when Torres fled his native country for Mexico to avoid the potential dangerous repercussions of teaching ideas that were contrary to state interests. This section is provided especially for an American audience that may not be familiar with the political and economic history of Argentina, to help contextualize the historical landscape that shaped Torres' childhood and early adulthood. It will also offer a brief history of the rise of neoliberalism in Latin America, the United States, and internationally, which served as the second major political and economic context that influenced the development of the political sociology of education as a multiperspectival and interdisciplinary analysis of the political, social, and economic conditions that shape and are shaped by educational policy and practice.

Life and Times

Carlos Alberto Torres was born in 1950 to a working-class family in a low-income neighborhood, or what might now be called a *villa miseria* or *villa de emergencia,* on the outskirts of Buenos Aires in Argentina, a nation that had undergone considerable political instability and economic turbulence in recent decades and was to experience even more during Torres' formative years there. His own parents, Domingo Roberto Torres and María Laura Novoa de Torres, were born in 1926 and 1924 respectively, shortly before the start of the Great Depression, which, as it did throughout much of the world, significantly impacted Argentina's economy and employment and, as a result, the political and social conditions of its people.

The Argentinian Context, 1900 to 1930: Growth, Prosperity, and Promise

Prior to 1930, the start of the "Infamous Decade" (*Década Infame*), Argentina had been relatively prosperous – it had been one of the ten wealthiest nations in the world in 1915, richer than France, Germany, and Italy, and had maintained the fastest-growing GDP for the better part of the previous half-century. In the words of *The Economist* (2014), the country could have claimed during this period to be "the world's true land of opportunity." Yet this wealth was not always shared equally: Much of it was concentrated among the rich landowners of the Pampas, the fertile lowland plains, who converted their land toward economic exploitation during this boom period (*The Economist,* 2014; della Paolera & Taylor, 2010; Alvarado, Cruces, & Gasparini, 2019; Spruk, 2019). The opportunities were enough to attract large waves of European immigrants to work in the Pampas, however, and those immigrants carried new ideas with them that gradually shook the foundations of oligarchic conservatism that had long ruled the country (Larson, 2020; Romero, 2002).

The result of these new ideas was the Radical Revolution of 1905, a civil-military uprising against the oligarchy that had been brewing for years. Members of the Radical Civic Union, founded in 1891 by radical liberals to agitate for universal male suffrage, attempted to occupy several city buildings and military bases across Argentina with minimal success, and the rebellion was quickly crushed by government forces. Nonetheless the cause they had been fighting for, extending the vote to all male citizens as a means of resistance against oligarchic corruption and dominance, remained a major political cause, and with the amnesty extended to its participants in 1906, and particularly to its charismatic leader, Hipólito Yrigoyen, the stage was set for an eventual capitulation to its demands (Rock, 1987; Romero, 2002; Hedges, 2011).

Six years later, the Sáenz Peña Law of 1912, supported by and passed during the presidency of Republican President Roque Sáenz Peña, established the right to vote for all native and naturalized men in Argentina (suffrage was not extended to women until 1947, under Perón). The law itself was the result of a calculated deal between Sáenz Peña and Yrigoyen, the opposition leader, who agreed to stop working toward revolutionary overthrow in exchange for modernization of elections and efforts to end electoral fraud and corruption. Sáenz Peña himself saw the law as a way to thread the needle between two opposing and potentially destructive political forces: conservatives on the one side, who vehemently opposed the expansion of democracy, and radicals on the other, who, if they continued to be thwarted, could revolt again. He supported reform as a means of lessening rising tensions and fending off the potential for revolution in the face of growing frustration among the working class with economic inequality and the stranglehold that the conservative oligarchy still maintained (Romero, 2002).

The Sáenz Peña Law not only extended the right to vote to all male citizens in the country, but, crucially, made voting secret and compulsory. These two factors brought a temporary end to the oligarchy's dominance of Argentinian politics – by making the vote secret, its potential for corruption was weakened, and by making it compulsory, public support became for the first time the determining factor for power in the nation. It also created, in the context of widespread distrust of politicians and institutions as a result of oligarchic corruption, the potential for populism – a powerful political force across Latin America for much of the 20th century that developed in complex and varied forms throughout the region, especially in Argentina.

Universal, secret, compulsory male suffrage led to the election of the charismatic radical progressive Hipólito Yrigoyen as president in 1916. That year also marked Argentina's first peaceful transition of power, itself considered a hallmark of stable democracies, which gave its citizens a sense of hope for political stability as well as greater economic equality in the future. With Yrigoyen's election came a push for reforms toward expanded democracy, social justice, and economic redistribution, but it also began a period of political upheaval that precipitated the much greater instability of later decades. Conservatives had controlled Argentinian politics for too long to give up power easily (Brown, 2010).

Yrigoyen's administration also ushered in for the first time a spirit of nationalism in Argentina, albeit arguably an optimistic nationalism that focused on self-empowerment and independence for the nation, working to nationalize the country's energy and transportation systems and its oil production as well as creating a central bank to provide it with greater control over its own currency and trade (Romero, 2002). The economic expansion that occurred over the span of his two periods as president – after losing the presidential election to a rival within the Radical Civic Union in 1922, he was re-elected in 1928 – averaged 8.1 percent annually, still one of the most remarkable periods of growth in the country's history, only to end with the global impact of the international economic crisis that began in late 1929 and hit Argentina and the entire Latin America region especially hard throughout the 1930s (della Paolera & Taylor, 2010). By this point, the twin seeds of populism and nationalism had begun to sprout and spread within the nation.

Given that over 80 percent of Argentina's revenue relied on foreign trade, the global impact of the Great Depression led to a sharp economic downturn, and the consequences –

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declining salaries and rising unemployment and inflation – led to the social and political unrest

that created the conditions for the military coup that ended Yrigoyen's presidency and the

liberal-progressive impulses that defined that area in Argentina (della Paolera & Taylor, 2010;

Lewis, 2003; Romero, 2002). On September 6, 1930, Lieutenant General José Félix Benito

Uriburu led a small unit of troops into Buenos Aires and into the presidential palace to seize

control of the nation's government and establish a military dictatorship. Uriburu was supported

not only by far-right nationalists but, strikingly, by cheering crowds who had grown frustrated

and exhausted by economic turmoil (Lewis, 2003; Brown, 2010). They had also grown wary and

suspicious of Yrigoyen's progressive populism. Despite the economic prosperity that had

flourished under Yrigoyen's administration, Argentinian historian Luis Alberto Romero (2002)

writes,

> Another view of the country was possible ... and many contemporaries adhered to it and
>
> behaved accordingly. For them, Yrigoyen resembled a barbarous caudillo, one of the
>
> warlords who many had believed were eliminated in 1880 with the end of endemic civil
>
> war and the final consolidation of political power in Buenos Aires. A government of the
>
> mediocre seemed to stand behind Yrigoyen. The political transition to democracy was
>
> viewed with suspicion; those who felt displaced from power demonstrated little loyalty
>
> toward the recently established institutional system and longed for a time when a select
>
> elite governed. Moreover, the First World War, which had broken out in 1914, offered a
>
> glimpse of the end of the era of easy progress, with growing difficulties and more
>
> precarious economic conditions, in which the relationship with Great Britain would be
>
> insufficient to ensure prosperity. The political and social tensions beginning to spread

throughout the world during the final phase of the war, which were unleashed at its

conclusion, were also manifesting themselves in Argentina and encouraged those who

foresaw a future dominated by conflict. Society was sick, it was said; those who were

responsible were foreign organisms; ultimately immigration itself was to blame. Thus an

increasingly intolerant attitude grew in the country, expressed in a truculent nationalism.

(p. 2)

That expanding sense of nationalism, increasingly taking on the darker and more partisan and

polarized elements of its ideology, became even more central to the national narrative in the

coming decades. It was also helped along by Yrigoyan's own actions, which included a series of

aggressive federal interventions into formerly private enterprises and issues and for his suspected

connections to the assassinations of political rivals, weakening public support for his

administration and created an increasing distrust in his policies (Munck, R., Falcón, R., &

Galitelli, 1987).

The Argentinian Context, 1930 to 1946: *Década Infame*

1930 began what is now known in Argentina as the "Infamous Decade" (*Década Infame*),

a period marked by rapid economic decline, social unrest, and political corruption and scandals.

It also saw the widespread mobilization of farmworkers from rural areas to cities in the wake of

the collapse of the agricultural sector during the Great Depression, which increased the potential

power of labor as a political force in the country and led to increasing class tensions due to

resentments over economic, social, and political inequality (Romero, 2002; Rock, 1987; Hedges,

2011).

During and after the coup that overthrew Yrigoyan's democratic regime, newly self-appointed military dictator José Félix Uriburu's strongest support came from the *Nacionalistas,* a far-right nationalist movement that sought to restore the traditional oligarchic order of previous decades. Advancing that cause, the brutal dictatorship that he led sought to undo the Sáenz Peña Law and end universal suffrage, reasoning that, in a country with a 60 percent illiteracy rate, the majority is uninformed and therefore unfit to make decisions about what is best for the country (Lewis, 2010). In crude form, Uriburu's argument here offers a nascent theory of state that served as one pole, siding with the oppressive elites against the people, in the ongoing debate carried out through force, rhetoric, and mobilization in Argentina and Latin America as well as much of the developing world throughout the 20th century regarding the role, value, and purpose of democracy. This context informed the perspective that Brazilian educator and philosopher Paulo Freire later developed in response, focusing on the role of literacy within the dialectic of oppressor and oppressed that shaped individual consciousness, and which in turn influenced Torres' own work on dialogue, democracy, and the power dynamics of education. There were other important moments in the development of this dialectic of democracy throughout Argentina's complex political history in the twentieth century, but the conflict between Yrigoyan, a complex, contrarian, and deeply flawed early defender of democracy, and Uriburu, a violent dictator who was inspired by Mussolini and whose repressive regime provided an all too visible display of the reaction of power when its dominant status is threatened, set the stage for much of what was to follow in the coming decades (Munck, R., Falcón, R., & Galitelli, 1987; Lewis, 2010). The Argentinian coup of 1930 was only the first of six successful military coups – the others coming in 1943, 1955, 1962, 1966, and 1976 – that

shaped and scarred the country's political and social landscape in the twentieth century. This was

the landscape in which Torres' parents, and later Torres himself, grew up and lived.

The Argentinian Context, 1946 to 1955: Perón and Peronism

The commanding and iconic figure of Argentinian politics in the twentieth century, and

decades after his death still one of the most influential political figures in modern Latin

American history, is Juan Perón, who served as president of Argentina from 1946 to 1955 and

then again from 1973 to 1974. Peronism, a complex and continually evolving combination of

nationalism and populism, remains a vital force within Argentinian politics well into the 21st

century – several recent presidents of the country have been Peronists – and has influenced and

inspired populist labor movements in several Latin American countries (Herrera, 2007; Keen &

Haynes, 2012; Di Tella & Dubra, 2018). Hugo Chávez's rule in Venezuela, for example, owed

both its style and substance largely to Peronism (Sunkara, 2012), and Luiz Inácio Lula da Silva's

presidency in Brazil in the mid-2000s arguably borrowed from elements of Peronism.

Both Perón and Peronism remain deeply controversial and divisive subjects in Argentina

and throughout Latin America, and this controversy is compounded by the efforts to erase and

rewrite history several times over in the years following his presidency. His supporters praise his

pro-labor policies and his work to eradicate poverty and address economic inequality, while his

detractors view him as an anti-intellectual demagogue and despot – a prominent slogan from his

presidency was "Shoes? Yes! Books? No!" (*Alpargatas sí, libros no*), and over the course of his

rule he terminated over two thousand university professors across the country in response to

student and faculty unrest (Rock, 1987; Rein, 1997).

Both views have truth to them. After a shaky recovery from the Great Depression, Argentina's economy grew under Perón, with GDP increasing by over 25 percent from 1946 to 1953. Initially running for president on a platform of social justice and economic independence, he expanded the nation's infrastructure, worked to modernize its electrical grid and energy systems, nationalized oil production, and dramatically expanded social services, including building thousands of new schools, including technical and career schools (Romero, 2002; Rock, 1987; Rein, 1997). Labor unions became powerful institutions during his presidency – by 1950, membership had grown to over 2 million people, out of a population of 17 million and an economically active population of 7 million, comprising a dominant bloc within the electorate. Social security had expanded to cover nearly 70 percent of the working population, health insurance coverage increased, and real wages rose by over 30 percent over the course of Perón's first two terms in office (McGuire, 1999; Rock, 1987).

The period of his rule from 1946 to 1953 was also marked by state-sponsored violence and authoritarian repression. One of the darker defining characteristics of Perón's presidency was aggressive suppression, imprisonment, and even murder of its opposition. Like Uriburu before him – and Perón himself had taken part in the 1930 military coup in support of Uriburu – Perón followed closely and learned from the fascist rule of Benito Mussolini, with some scholars identifying Peronism essentially as a project to import Mussolini-style fascism into Argentina (Brennan, 1998).

A key element of both Mussolini's and Perón's rule was the silencing of critics, especially within the media and higher education, and the branding of these "elites" as the enemy of "the people" (Rock, 1987; Brennan, 1998). Another was the use of populist appeals as a

means of establishing dictatorial rule – populism enables authoritarian leaders to define "the people" in a manner that best suits their own political interests and enables them to maintain and advance their own position of power, and then project the perception that all of their actions, even and especially violent actions, are merely in defense of "the people" and their interests. The leader is simply a manifestation of the people's will.

As such, Peronism amounted to a distinct combination of left-wing and right-wing populism, drawing on both strands – advancing social justice through policies that supported labor, economic equality, and social welfare along with an aggressive, virulent, and despotic nationalism – to maintain popularity and power. The advancement of the impulses of populism and nationalism under Perón intensified political polarization and violence on both sides – coup attempts were followed by violent and forceful reprisals followed by more coup attempts, culminating in 1955 with Argentina's third successful military coup in three decades and serving as a harbinger for the increased violence in the decades to come (Rock, 1987; Romero, 2002).

The Argentinian Context, 1955 to 1973: Rising Tensions

Mounting economic problems toward the end of Perón's first presidency, coupled with growing concern over the dangerous effects of the cult of personality that was growing around him, led to his overthrow in September 1955 and the establishment of another military junta. This also began a period of considerable instability in Argentina – the general who initially took over rule of the country was deposed two months into his presidency, replaced by a hard-line nationalist (Rock, 1987; Romero, 2002; Brown, 2010). Torres was five years old at this point, born into a nation that was facing increasing fragility, turmoil, and uncertainty.

In the immediate aftermath of Perón's downfall came a wave of anti-Peronism and de-Peronization, and in particular a rewriting of contemporary history to reframe Perón and his wife as corrupt plutocrats and, not coincidentally, to discredit the policies he advocated. Nonetheless Peronism – supported by Perón, still enormously popular among many Argentinians, from his exile in Spain – continued to hold influence in the country, and by the early 1960s Peronist candidates were increasingly winning local and regional elections (Rock, 1987; Romero, 2002; Lewis, 2003; Hedges, 2011).

This period was also not without its advances – Argentina saw moderate economic growth and infrastructure development through the mid-60s – but unrest among labor, students, and the military eventually led to yet another military coup in 1966, the fourth now in four decades, when Torres was 16 (Della Paolera & Taylor, 2010; McGuire, 1999). The newly established anti-liberal and anti-communist military regime oversaw a dramatic rollback of labor rights and support, including elimination of the right to strike and a devaluation of the national currency that dramatically weakened the agricultural sector. General elections were halted and a series of anti-democratic military rulers followed, along with growing instability in the ongoing conflict between labor and the oligarchy and Peronists and the military government, as well as between left-wing and right-wing factions of Peronism itself (Rock, 1987; Romero, 2002; Lewis, 2003; Hedges, 2011).

During the late 1960s and early 1970s, toward the end of this prolonged military governance, efforts were made to restore some semblance of democracy in order to calm mounting tensions among the nation's workers who were nostalgic for the advances that labor had enjoyed under Peronism. General elections were called for the first time in a decade in 1973,

and although Perón himself had been barred from running, a Peronist proxy candidate won on a platform of economic equality, infrastructure development, and nationalization. The oligarchs' fears of populist democracy came to pass, as the "illiterate" majority voted in candidates who favored – or, in the oligarchs' view, those candidates seduced or bought off the masses with – promises of wealth redistribution (Rock, 1987; Romero, 2002; Lewis, 2003; Hedges, 2011).

The Argentinian Context, 1973-1976: Violence and Exile

In late 1973, members of the Organization of Arab Petroleum Exporting Countries (OPEC), led by Saudi Arabia, declared an oil embargo in response to international support for Israel in the Yom Kippur War, quadrupling the price of oil overnight and resulting in a sharp global economic downturn with a sharp increase of both inflation and unemployment. In the wake of this oil crisis, Argentina, heavily dependent on oil for its economy and consequently facing its own severe economic crisis, experienced a wave of terror from both left-wing and right-wing factions. The Peronist president resigned, new elections were called, and Perón, his ban on running for office lifted, won the presidency in a landslide with 62 percent of the vote (Rock, 1987; Romero, 2002; Lewis, 2003; Hedges, 2011). Reflecting on Perón's restoration, Torres (2014) writes,

> Argentina was deeply damaged by widespread political conflict wherein the armed
> forces, characterized by their anti-Peronism, were confronting a national popular
> movement of the working classes, known as Peronism or Justicialism, that saw, in the
> mythical figure of Perón, a heroic national savior whom they were trying to reinstate

almost 20 years after he had been deposed and exiled by the military coup of 1955. (p. 13)

This optimism was misplaced. The right-wing faction of Peronism won out and Peronism in practice, under Perón's own leadership, soon transformed into a Latin American version of National Socialism. Class warfare and violence increased, and Perón died of heart failure a year into his presidency in 1974, replaced by his wife, Isabel, who was unable to manage the nation's rising political and economic problems or the escalating conflict between left-wing and right-wing extremism. These tensions culminated in the military coup of 1976 and the installation of a military dictatorship far more brutal than the one that had taken power in 1930, which soon led to Torres' flight from Argentina under threat of violence and potential death (Rock, 1987; Romero, 2002; Lewis, 2003; Hedges, 2011; Torres, 2014; Torres, 2016; personal interview, August 2018).

This was the political and economic environment that Torres and his family grew up in and lived through, buffeted from increasingly radical extremes of utopianism and violence, and the dialectic of those extremes served as the framework for Torres' upbringing in the 1950s and his intellectual development through the 1960s and 1970s.

The Education of a Political Sociologist of Education

When Torres was born in 1950, as Argentina was still recovering financially from the effects of the Great Depression and the aftermath of the economic impact of World War II, his father was unemployed and his mother held a working-class job in a shoe factory. His father was eventually able to manage a fruit stand, but that was soon wiped out in the economic crisis of

1952. In 1955, his family moved in with his aunt in Flores, a lower-middle-class neighborhood in Buenos Aires, which raised the quality of schools available to them. Although they had limited formal schooling themselves, his parents continually reinforced the value of education, encouraging Torres to pursue a college degree, and they remained in Flores through Torres' secondary-school years, as he studied to become a lawyer based on his skill with arguments (Shin & Hou, 2019; Malsbary & Way, 2014; personal interview, August 2018).

Torres struggled in his early years in high school but began to excel after being introduced to sociology and political economy, subjects that captured his interest and that he grasped quickly (Shin & Hou, 2019; Malsbary & Way, 2014; personal interview, August 2018). Political economy in its classical form examined the relationship between economic production and law, understanding the creation and distribution of wealth as a product of that relationship. As taught in Latin America in the 1960s, however, political economy emphasized a Marxist approach and critically examined the root causes of economic inequality, understanding both production and the legal framework that defines and enables it not as natural or neutral systems but as manifestations of political interests – that is, power is codified, reinforced, and reproduced through economic production (Rein, 1997). These operations perhaps become more overt and manifest in regions with more frequent political upheaval, such as Latin America in the mid-20th century, where political and economic leaders have not had the time to convince the electorate that the order of things is as it should be and as nature decrees rather than simply the will to power of specific interests. This experience also framed for Torres the emerging dialectic between overt and subtle political force – between state-sponsored violence and the "friendlier"

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coercion of hegemony, or the manufacturing of common sense, to discipline people's political, social, and economic behavior.

When Torres graduated from high school in 1968, two years into the rule of right-wing military dictator Juan Carlos Onganía, he departed Argentina for missionary work in Columbia as part of his training to become a priest. He had discarded his earlier plans to become a lawyer, given his emerging understanding of the law as all too often an instrument for the codification and reinforcement of the interests of power, especially under oppressive regimes such as the one he lived through during his final years in high school. In recent years he had also become a leading member of a Catholic youth group in Argentina that emphasized liberation theology and community-oriented works (Shin & Hou, 2019; Malsbary & Way, 2014; personal interview, August 2018). Liberation theology, with its emphasis on political liberation of the oppressed, appealed to Torres' sense of social justice developed from his Catholic upbringing, his close friendship with the prominent Argentinian philosopher and theologian Enrique Dussel, and from his study of political economy in school, which demonstrated that the material social conditions that people live in, including the opening up or closing down of opportunities for development, improvement, and liberation, are the result of the underlying economic and political order shaped by those in power (Torres, 1992; personal communication, April 2021).

After completing four months of missionary work in Colombia, Torres returned to Argentina in 1969 to enroll at the Jesuit University of El Salvador, where he continued his study of sociology. At the time, the university had the strongest and most rigorous sociology program in the country, with a strikingly progressive and critical focus, and Torres was introduced to a wide range of classical and contemporary social, political, and economic theorists including

Hegel, Marx, Weber, Habermas, Marcuse, and Fanon, which crucially established the framework for his later study of Freire and his work on liberation pedagogy that began Torres' scholarly career. He completed his degree in 1974 with honors and a teaching credential in sociology, becoming the first member of his family to complete a university education and taking a position with ECLA (Estudios de la Ciencia Latinoaméricana, or Latin American Science Studies), teaching political philosophy (Shin & Hou, 2019; Malsbary & Way, 2014; personal interview, August 2018; personal communication, August 2021).

After graduation, Torres was offered several teaching posts in philosophy and social science at a handful of Argentinian universities. He chose instead to help build a commune in rural Patagonia on the southern tip of Argentina, inspired by his commitment to liberation theology, by the lingering utopian idealism and communitarianism of the late 1960s, and by the work of critical social and education theory such as that of Paulo Freire. He also sought an escape from the political violence, class struggle in the streets, and the authoritarianism that he had experienced throughout much of his life in Buenos Aires (personal communication, April 2021). His utopian plans for a commune ended in tragedy, however, when three friends and members of the commune – César Lugones, María Marta Vásquez Ocampo Lugones, and Mónica Mignone – were "disappeared" and assassinated in May 1976 for attempting to provide literacy training to the poor (Dandan, 2013; Torres, 2014; Torres, 2016; Malsbary & Way, 2014; Shin & Hou, 2019; personal interview, August 2018). Torres himself was likely saved because he had remained in Patagonia and had not joined the other three members, Cesar Lugones, Maria Marta Vazques Lugones, and Monica Mignone, in teaching literacy training in a Buenos Aires shantytown (personal communication, August 2021).

Concerned for his safety and that of his family, Torres fled to a remote area of Patagonia, where he briefly remained during the increasing political turmoil and violence surrounding the end of Isabel Perón's presidency and the rise of the brutal military junta that followed. While there he completed the first published book on Paulo Freire, a critical biography and analysis of Freire's work (Torres, 1978a), the first of several books on Freire to come throughout his career, and waited in vain for normalcy to return.

There are two fascinating anecdotes regarding "official" curriculum and the long arm of the state from Torres' school days and his early years as a teacher. The first he describes in a brief biographical profile (Torres, 2014), when he was taking a semester-long course in sociological theory, which is worth quoting at length:

> The two professors in charge of the course along with their adjunct professors and teaching assistants – what is known as *la cátedra* – gave us a very elaborated and long syllabus based on Critical Theory, particularly the works of Jürgen Habermas, Max Horkheimer, Theodor W. Adorno, and Herbert Marcuse. Because I had a fellowship that paid my tuition, I was living with my parents, and teaching in a catholic school, I scrambled to pull together resources and buy all the required books.

> After a month or so into the course, *la cátedra* came back and told us that given the social and political conditions of Argentina, and the shifting political-ideological debates, they had changed their theoretical position. Logically they had changed the syllabus, now focusing on Marxism and some of the key authors of the time. With my meager remaining resources, I bought two or three of the books that I thought were most important and began to read them in earnest.

Two months before the semester ended, *la cátedra* informed the students that they

had changed their political and theoretical position again. They felt they were now part of

the *Cátedras Nacionales*, an amalgam of the Peronist Left, national-popular movements

of national liberation, and a critical reading of neo-Marxism. I could not buy the third set

of books. My budget was exhausted. (Torres, 2014, p. 232)

The anecdote is presented comically, but it produces a remarkable and compact illustration of the

rapid replacement and re-replacement of "official knowledge" that reflects and reproduces the

interests and values of the state. Remarkably, given that curriculum studies and critiques of

"official knowledge" often emphasize conservative encroachment on the value, production, and

reproduction of knowledge, the anecdote also illustrates a process of an increasingly hardening

leftist political perspective. The political right does not have a monopoly on the use of power to

advance and reproduce its interests.

The second anecdote is provided to Torres' introduction to his book on Freire's early

writings (2016), describing a conversation he had with Julio Barreiro, Freire's editor and the

would-be editor of Torres' first book on Freire in 1976 during the peak of the political turmoil,

when he was teaching in Patagonia:

I noticed that Julio seemed agitated and asked me what I was teaching in my courses. I

told him I was offering courses in philosophy, adult education, and business organization

and administration, using texts by Freire, Marx, and Piaget. He stopped me with a

peremptory and preoccupied tone: "Carlos, you have to return immediately, ask for your

course outlines, destroy them, and replace them with others containing different

bibliographies, ones that do not include Piaget, Freire, or Marx. The Secretary of

Intelligence (SIDE) [of the] National Agency of Security is inspecting educational

establishments and, as these authors are banned, there can be very grave consequences

for those who teach Freire, Marx, and Piaget. (p. 19)

The coupling of the threat of state-sponsored terror with state-approved curriculum, or, more

precisely, curriculum forbidden by the state, provides a striking illustration of the twin forces of

dominant political power that Torres experienced close-up – violence and social and cultural

reproduction. Both provide examples of the ways that, as Foucault argues, citizens are

disciplined by the state and are thus reproduced in its image.

The latter anecdote came only a few months after a similarly chilling experience Torres

had with the same editor, who told him that perhaps they could publish his book on Freire in

Italy, in Italian, but not in Argentina under the current conditions. Those two conversations,

along with the disappearance and murder of his friends and colleagues from the commune a year

earlier and the assassination of a prominent human rights lawyer, led him to realize that

Argentina was no longer safe for him or his family. He went into self-imposed exile in Mexico

soon after, in September 1976, to pursue a master's degree in political science at the Latin

American Faculty of Social Science (FLACSO), and his family followed in December (personal

communication, August 2021).[2] His book on Freire would be published two years later in

Mexico and Brazil, the first of four that he wrote on Freire from 1978 to 1980 (Torres, 1978a;

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[2] One might argue that, given Torres' intellectual ambitions, he likely would have eventually pursued an
international academic audience for his work regardless of political circumstances in his native country, suggesting
that this move, or one similar to it, was inevitable in his career trajectory regardless of its specific cause. This is
likely the case, but the focus in this study is less on the particular path that Torres took than on the experiences and
context that shaped his sensibility and in turn shaped his perspective and the development of his work. To be
intimidated or frightened into exile, rather than departing under normal circumstances, puts one in a very different
relationship with one's homeland and complicates one's perspective on the role of state power. It also conveys the
tenuousness and fragility of democratic norms and institutions and undermines one's sense of safety and security no
matter how seemingly stable one's environment might appear.

Torres, 1978b; Torres, 1980a; Torres, 1980b), but, as his editor forewarned, was not published in

Argentina (Shin & Hou, 2019; personal interview, August 2018).

Having watched over his 26 years in Argentina the gradual collapse of democratic norms,

the continuous and increasingly wide political pendulum swings, the erosion of state institutions,

the dismantling of the national Constitution, and the rewriting of both history and curriculum

during the precarious years of the 1960s and 1970s, Torres could only watch from a distance in

exile on another continent as Argentina continued in its violent path. From 1976 until the fall of

the military junta and the restoration of democracy in 1983, the nation's government led a

program of state terrorism, now called the Dirty War, that resulted in the death or disappearance

of an estimated 9,000 and 30,000 people – communists as well as students, labor unionists,

writers, journalists, intellectuals, artists, and anyone considered to be a potential threat to the

junta's power or opposed to its economic policies. Torres also eventually learned, along with the

rest of the world, of the role of the United States – a country in which he would soon start the

remainder of his graduate study and the vast majority of his career – in supporting this

state-sponsored regime of violence and terror in the name of imperial capitalism (Blakeley, 2009;

Robben, 2007; Gordon, 2008; Torres, 2014).

The years that follow Torres' flight from Argentina characterize the more traditional

journey of an ambitious, driven, and highly productive academic. He completed his master's

degree at FLACSO in 1978 and worked for two years as Associate Professor and researcher for

the Secretariat of Public Education at the Universidad Pedagógica Nacional (National Pedagogic

University), continuing to publish prodigiously during this time as he has done throughout his

career, and then left Mexico in 1980 to pursue a second master's degree and then a doctorate in

international development education at Stanford University in the United States in 1980 (Shin &

Hou, 2019; personal interview, August 2018). His dissertation, completed in 1983, examined

adult education policy and planning in Mexico over the previous decade, critiquing the state's

approach to adult education based on its emphasis on skill development and career training at the

expense of a broader and more empowering and liberatory pedagogical approach – the hidden

curriculum of this approach inculcating the understanding that the value of the knowledge worth

having is directly tied to one's productivity as a worker in service to the economy, and, by

extension, the value of the citizen is expressed largely if not entirely through labor (Torres,

1983).

In the decade following his graduation from Stanford, he took a rapid succession of

teaching and research positions in several countries throughout the world, including Mexico, at

FLACSO; Sweden, at the University of Stockholm; the United States, at the University of

California, Los Angeles; and Canada, at the Ontario Institute for Studies in Education (OISE)

and the University of Alberta, where he served as an assistant professor in the Department of

Educational Foundations teaching courses on adult education, comparative education, and

sociology of education, and where, importantly, he met his future frequent collaborator,

Raymond A. Morrow. Collaboration, with Morrow and many others, would remain a hallmark

along with multi-disciplinary and interdisciplinarity throughout Torres' career.

In 1990, Torres returned to UCLA as an assistant professor in the Graduate School of

Education, teaching courses on Latin American education and politics of education. He rose

through the ranks quickly on the strength of several high-profile publications, being promoted to

Associate Professor in 1992, Professor in 1994, and Distinguished Professor in 2014, as well as

taking on a range of administrative roles, including Director of UCLA's Latin American Center from 1995 to 2005 as well as Founding Director of the UCLA Paulo Freire Institute from 2002 to the present. In 2016 he became the first UNESCO Chair in the University of California system in recognition of his work on global citizenship and global citizenship education, which have been the focus of his most recent research and the culmination and capstone of his agenda of both analytical and constructive interdisciplinary theory on education.

The State and Education in Twentieth-Century Argentina

As Argentinian historian Mónica Rein writes, "the education system of a country tells us a good deal about the nature of the country's political regime and its goals" (1997, p. 201), and the case of Argentina throughout much of the twentieth century is particularly telling. Education is frequently used by governments as an agent of change to support and advance its policies and interests, particularly toward strengthening national cohesion, and Argentina saw several examples of this before and during Torres' time in school there.

Argentinian educator and politician Silvina Gvirtz (2004) asserts, "State intervention has marked the Argentine educational system since its origins" (p. 1). Over the second half of the nineteenth century, state efforts were organized toward aligning the diverse and wide-ranging schools throughout the developing nation under a single set of national and provincial norms and regulations. This state monopoly on education held out through much of the century to follow, in particular through the regulation of the teaching profession and by favoring "those teachers that were in some way or other connected to the group that was in power at any given time" (Gvirtz, 2004, p. 2).

Growing student and faculty activism during Hipólito Yrigoyen's presidency led to the

Argentine university reform of 1918, which dramatically modernized and democratized higher

education, allowing universities for the first time to manage their own budgets and determine

their own curriculum – a version of what is now understood as academic freedom, a key element

that enabled higher education to flourish internationally in the twentieth century (Rein, 1997). It

was this development that enabled Argentina to develop a remarkably high quality of higher

education throughout the 1960s and 1970s (Rein, 1997).

The state still maintained its hold on primary and secondary education, however, and the

church gradually found its way back into schools as well. Perón reintroduced the catechism in

public schools in 1947 and provided extensive financial support toward the founding and

development of parochial schools. Perón's sharp reversal of these policies in 1954 contributed to

rising unrest and the military coup of the following year, when the military junta both restored

those pro-church policies and expanded private and religious institutions (Rein, 1997).

Student activism continued to challenge national authority, and tensions came to a head in

1966, when Torres was 16 and approaching time to begin university study. Students and faculty

across the University of Buenos Aires occupied buildings in protest against the military

government's decision to revoke the freedoms established by the university reform of 1918, and,

in response, on the "Night of the Long Batons" *(La Noche de Bastones Largos)* on July 29, the

government stormed university buildings and forcibly and violently removed them. In the

months to follow, hundreds of professors resigned or were fired, with over 300 fleeing the

country, resulting in a staggering and destructive flight of human capital for the nation that

dramatically impacted it for decades to come (Schugurensky, 1996; Robben, 2007). Self-imposed

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exile of academics and intellectuals became something of a grand tradition in mid-to-late twentieth-century Argentina.

Colonialism, Postcolonialism, and Critical Consciousness

The 1966 protests were part of the larger student movement sweeping much of the western world as well as developing nations in Latin America that brought critical awareness of both the repressive tendencies of the state, the role that higher education plays in reproducing or resisting dominant narratives, and the complex relationship between power and knowledge. They also called attention to both literal and metaphorical colonization: The need to recognize, reckon with, and make amends for the effects of historical imperialism and colonialism, as well as, inspired by critiques coming from postcolonial theorists such as the French West Indian writer Frantz Fanon and the French-Tunisian writer Albert Memmi, the ways that colonialism operates as both a physical and psychological force on both the colonized and the colonizers.

Although the country of Argentina is itself the product of colonialism, having been colonized by imperial Spain from the sixteenth to the early nineteenth centuries to exploit its gold and silver mines, the impact of colonialism has, to a considerable degree, been erased from Argentinian consciousness and culture (Crow, 1992; Eakin, 2007; Hedges, 2011). As historian Jonathan C. Brown (2010) writes,

> Many Argentines have neglected their colonial past. The reasons are fairly evident:
> Subsequent economic modernization and immigration radically changed the outward
> appearances of the nation, and the colonial past is simply not as visible in Buenos Aires
> as in other Latin American capitals such as Lima or Mexico City. Yet the colonial period

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established many more fundamental elements of Argentine life and society than modern

residents may care to admit. (p. 27)

These elements include hostility and warfare between natives and European settlers that

transformed into racism and xenophobia in the post-colonial era as well as ongoing class

warfare, economic exploitation, and stark social and economic inequality (Brown, 2010;

Romero, 2002). They also include a conservative, often church-backed traditionalism that serves

to justify inequality as the natural order – first as decreed by God, later as decreed by the

invisible hand of the market.

This understanding of colonialism and postcolonialism resonated with Torres' reading of

Freire and his concept of the pedagogy of the oppressed, and although there are similarities

between Fanon, Memmi, and Freire in their analysis of the conditions of oppression and

colonization, there are fundamental differences in their solutions. Above all, Freire emphasized

education as the means of liberation and social transformation through a careful process of

conscientization (critical consciousness), a type of learning that focuses on recognizing political

and social contradictions that have governed the social order and the lived experience of the

oppressed. In effect, Freire's method is a critical and complex revision of the Socratic method,

one that creates scenarios where learners themselves gradually come to critical understanding

through the process the educator has structured for them, rather than merely telling learners what

knowledge is worth having.[3] It also enables learners to recognize and appreciate the intrinsic

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[3] Barros (2020), in an analysis of the "many Freires," argues against the similarities between Socratic and Freirean dialogue, noting that, unlike the Socratic method, Freire's model is not seeking to arrive at a "correct" understanding that the teacher draws the student toward through leading questions. This is where Freire's work stands as a critique and revision of the Socratic method, then, without throwing out what is valuable in that method - the practice of dialogue, questioning, and the presentation of the teacher as on the same level as the student, coming with a different set of experiences, knowledge, and perspectives.

value of their own knowledge and their own forms of literacy, resisting the social hierarchies of knowledge and literacy that are reproduced through traditional economic, social, and political systems, as well as the negative self-images that are produced and propagated by the oppressor within those systems (Freire, 2018; Freire, 2021).

From this brief history we can see the experiential framework that shaped Torres' perspective along with a range of key concepts and conceptual relationships that have played a central role in his work throughout his career: nationalism, populism, neoliberalism, colonialism and postcolonialism, the complex operations of power and its impact on economic and social order, the intertwined dynamic of power and knowledge, the role the state plays in the establishment of proper knowledge and its value, and, most crucially, the importance of the state in maintaining order to allow for the vital dialogue that makes democracy possible. As Torres writes, "Democracy is a messy system, but it has survived because there is a sphere for debate and a set of rules that people follow even if they don't benefit from them."

We can also see the vital roles that the concepts of exile and utopia play in shaping his system of thought. Exile for Torres, as well as for Freire before him, is both a literal and a conceptual stance from which one views the center as a newly displaced outsider, formerly immersed within that system and now forced by distance into the perspective of reflection and introspection. It is when one steps outside of a system that, ironically, one can better see and understand that system, presenting a lived version of the Hegelian dialectic: a more complete synthesis comes through the dialogue between the self and the other. It also deeply instills the fragility and contingency, in both the standard and the Rortyan (1989) sense, of the concept of home. The ongoing political, social, and economic turbulence of Argentina from the 1930s, when

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Torres' parents were growing up and making their way, through the 1970s, when his own situation within the country became too unsafe to remain there, demonstrated the tenuousness of the democratic institutions, practices, and frameworks that much of the developed world takes for granted.

Utopia, in turn, becomes the replacement homeland for the exile – not as a literal place to inhabit but as a destination that one is continuously moving toward but never arrives at. As Argentina developed in the twentieth century, under both Yrigoyen and Perón came the hope and promise of utopianism among the poor and working classes to realize a better life, only to be soon cast back into turmoil with yet another revanchist military coup that attempted to reassert the traditional oligarchic order. In the classic formulation, "utopia" simultaneously means literally "no place," borrowing from the Greek οὐ ("not") and τόπος ("place"), as well as, Thomas More points out in his original text, "good place," from εὖ ("good") and τόπος (More, 2016). A utopia is an imaginary community that provides ideal living conditions for its citizens, and the history of social thought has several prominent examples of efforts to achieve utopia, from the work of Henri de Saint-Simon, Charles Fourier, and Robert Owen through the communitarianism of the 1960s that inspired Torres' own efforts to build a commune in rural Patagonia.

To date, however, every effort to achieve utopia has been doomed to fail sooner or later, and it's important to recognize that in More's own work the reader never actually gets there – we only hear about it second- and third-hand. Utopia, then, instead becomes a theoretical model that inspires both thought and action toward continuous improvement – it imagines the world otherwise, a fundamental component of art and literature, which Torres himself frequently draws

upon on his own writing (it's also worth noting that, in addition to his scholarly work, Torres is a published novelist and poet), and by that imagining it creates the possibilities for opening up new understandings and new perspectives. Critical social theory in its most optimistic and progressive forms draws upon a similar impulse, not only providing an analysis of the limitations, contradictions, and oppressive and repressive forces and tendencies of contemporary conditions but also offering as a replacement for those conditions a utopian vision of other, more ideal possibilities – possibilities that, almost by definition, cannot be fully realized, but it's the vision that gets people moving toward a better place than they were, wherever they wind up.

Collectively, then, the intertwined concepts of exile and utopia for Torres provide the conceptual framework for the theoretical system that emerged through his work to both critique current conditions and provide a pathway toward the continuous protection and improvement of democracy through educational praxis. We can now turn to an exploration of that theoretical system.

Chapter 3: Theoretical Context for the Development of the Political Sociology of Education

The Origins of the Political Sociology of Education

The term "political sociology of education" was first used by the British sociologist of education Roger Dale in an influential 1983 review of recent books on education policy. In his review, Dale identifies the growing recognition that the rigid disciplinarity that had traditionally informed analyses of education and its effects was insufficient to account for the complex interrelations of political, social, economic and cultural factors that shape and influence them. This politically oriented sociology of education offered a constructive critique of what had come to be called "the new sociology of education," an increasingly prominent framework in the 1960s and 1970s emerging from the work of educational theorists such as Basil Bernstein and Michael F. D. Young that, while it brought a more critical lens to the political function and effects of education, focused too narrowly on educational processes at the expense of attention to structures and systems (Dale, 1983; Karabel & Halsey, 1976; Saha, 1978; Whitty, 1985; Weis, McCarthy, & Dimitriadis, 2006).

Sociology of education itself had emerged from the structural functionalist tradition within sociology, influenced by French sociologist Émile Durkheim and his work on education as a vehicle to establish social solidarity and stability. Much of the early work within the sociology of education assumed that education was a means for social mobility – with industrialization came the increasing need for a technologically prepared labor force that required new knowledge and new skills and, therefore, provided opportunities to overcome the rigid limitations of class stratification. Schools allowed for the possibility that traditional class

structures could be overcome by the technocratic and meritocratic systems they provided toward

advancement. By the 1950s, however, British sociologists increasingly began calling attention to

the role that education policies played in perpetuating rather than diminishing social inequality

(Floud, 1956; Lauder, Brown, & Halsey, 2009).

The Critical Turn in Education

      This critical turn expanded in the 1970s to address the ways that educational structures

and processes contribute to the reproduction of social, cultural, and class divisions and thus

structure and limit opportunities. This work took several forms, the most prominent and

influential within the United States being the economic-oriented approach of Jencks (1972) and,

most famously, Bowles & Gintis (1976), who argued that educational institutions and practices

re-enact the structure and processes of capitalism and consequently are primarily designed,

whether consciously or intuitively as the result of implicit ideological influence, to prepare

students to enter into the capitalist labor market and serve and perpetuate the interests of that

system. In its overdependence on a Marxist base-superstructure model, whereby the economic

base determines the superstructure of social and cultural institutions and processes such as law

and education, Bowles & Gintis' model was crudely deterministic, but it had had enormous

influence on the generation to follow for its ability to make bold and rhetorically powerful claims

about education's impact on class and inequality in America.

      A second generation of this critical turn emerged in the late 1970s and early 1980s, with

theorists including, most prominently, Michael W. Apple and Henry A. Giroux, as well as Geoff

Whitty, Lois Weis, and Thomas S. Popkewitz, among others, who further codified and

institutionalized the radicalism of the 1960s into a more research- and theory-driven and empirically informed movement toward social justice within education as well as the recognition and examination of education as a site of struggle for both the maintenance of power and the potential for empowerment of the oppressed. The work of this generation began increasingly to examine the broader range, scope, and effects of education, not only policy, institutions, processes, and curriculum, but also the relationship between structure and agency and the dynamics of gender and race for the ways that education shapes identity and, too often, reinforces inequalities around and between them. This was the intellectual context of the sociology of education in the United States when Torres arrived, heavily influenced by the Argentinian and Latin American context as well as by the work of Paulo Freire, which had not fully taken root yet within the U.S. academic context.

Paulo Freire and the Development of Emancipatory Education

Given the enormous popularity and success that Freire's work has enjoyed in the United States for the past several decades – as the most recent American edition of Freire's most famous book, *Pedagogy of the Oppressed,* states proudly on the cover, "Over 1 million copies sold," and one 2016 study found that it was the third-most cited book in the social sciences (Green, 2016) – one can be forgiven for assuming that Freire's impact on the sociology of education in America was instantaneous upon publication of the first English translation in 1970. The political and social environment was certainly ripe for it to be an immediate blockbuster, arriving in the wake of the emerging critical consciousness of the 1960s about class and inequality. Yet, although Freire had been deeply influential to many educators and activists throughout Latin America

(Schugurensky, 2011), as both Torres (2014, 2019) notes and Gottesman (2016) explores in detail, his impact on the English-speaking academic world was minimal to nonexistent until the early 1980s.

The influential American educator and activist Jonathan Kozol had been an early advocate, publishing a forceful letter in *The New York Review of Books* even prior to *Pedagogy of the Oppressed's* English publication urgently calling for readers to engage with Freire's ideas, which, he asserted, were "directly relevant to the struggles we face in the United States at the present time" (Kozol, 1970, p. 53). Kozol's's call did not go unnoticed – Freire received positive reviews in a broad range of popular publications for general readers, including a high-profile write-up in the *Washington Post* – but, within higher education, what little attention Freire received was largely dismissive. A representative example argued that

> Freire's criticisms of education, based primarily on his assumptions about the relationship
> between teachers and students, are neither new nor particularly useful in bringing about
> an improvement in the process. (Griffith, 1972, p. 67; Gottesman, 2016)

Other reviews from the time found Freire's work "extremely naive," "often illogical and inconsistent," and, at best, "thought provoking" and found his methods "effective if not altogether honest" (Gottesman, 2016). The institutionalized environment of higher education in the United States, still heavily influenced by the structural functionalist model with the sociology of education, was not yet ready for Freire.

Indeed, it was the critical turn that developed simultaneously but separately in the U.S. that enabled his work to be successfully imported into an American context, rather than Freire's work inspiring that critical turn itself. Strikingly, a major catalyst for Freire's eventual

widespread recognition was Henry Giroux's reading of *Pedagogy of the Oppressed,* which he found deeply inspiring, while working as a high school teacher in the mid-1970s. Freire's other major early advocate in the U.S., Jonathan Kozol, had also been a high school teacher, suggesting that outsider status relative to higher education, as well as direct and immersive experience with the lived experience of schooling in the United States, was necessary at the time to find deep connections with Freire's ideas. It was only when Giroux became a university professor himself in the early 1980s and created opportunities for Freire to widen his network with American scholars that Freire gradually began to gain recognition and influence within U.S. higher education (Gottesman, 2016). Torres' arrival in the United States happened to coincide with the period when the American academy was only just starting to take notice of Freire, although for the next decade and a half his work on Freire continued to situate him specifically and largely within a Latin American context, albeit not surprisingly given that Torres' work at the time focused primarily on comparative and Latin American education.

Freire's work is often broadly sketched, elliptical, enigmatic, and lyrically poetic, at times less theoretically elaborated and articulated than evocative and inspiring. It draws on the work of a wide range of thought, including classical and contemporary philosophy, political theory, psychology, Marxism, and postcolonialism, into a loose theoretical skein that ties his utopian aims of social justice and transformation to his pragmatic efforts toward literacy education for poor adult learners. The impact of his writings benefits considerably from the fame he achieved from his literacy programs in Brazil in the early 1960s, when he taught hundreds of fieldworkers to read and write in 45 days, and based on that success, the program was soon expanded to include thousands of "cultural circles" to advance literacy across the country; the inspiration his

writings continue to bring draw not only from the emancipatory potential of his conceptual framework but the powerful model he set in his own field work. Freire's efforts to expand literacy in Brazil ended abruptly when a right-wing military junta took power in 1964, again supported by the United States government, followed by brief imprisonment and exile, but he soon returned to working in government supporting adult and popular education in Latin America and Africa and continued to produce influential work on critical pedagogy over the next several decades up until his death in 1997.

The concept of emancipation itself is worth considering in relation to the term more commonly associated with Freire, liberation. Both concepts carry a utopian impulse of freedom, but, as with any utopian adventure, the goal is what is accomplished in the traveling rather than in the destination: Both indicate an ongoing and never-ending process, not least because they contain within them the seeds of their opposite that the liberated or emancipated are forever engaged in the process of escaping. "Emancipation" comes from the Latin word for slave (*ex-mancipium,* "out of slavery"); but, once one becomes an "ex-," one is always in some capacity that thing, similar to Freire's acknowledgement that the oppressed always keeps an element of the oppressor within themselves, and the oppressor, through the position and act of oppression, is always divided in their sense of humanity and subjectivity. "Liberation," meanwhile, from Latin by way of Old French, is the act of setting free from restraint or confinement; the act of liberation, then, carries the stamp of that restraint. Liberation in the Freirean sense is drawn from liberation theology, which is explored elsewhere in this study but is in at its core a Christian movement particularly associated with Latin America in the 1960s and 1970s that takes seriously the teaching and acts of Christ to liberate the oppressed – it works to

redress social injustice and political and economic inequality, which serve as restraints on the self-actualization and self-determination of the poor. One can never be fully liberated, however – not only because the impulse of both liberation theology and liberation pedagogy is inherently utopian, given that their work can never ultimately be finished due to the perpetuation of inequality and injustice, and because, as both Fanon and Memmi noted about colonization and imperialism, one is permanently altered by the condition of oppression, even as liberated as they may subsequently become.

Expanding on these concepts, the Argentinian political philosopher Ernesto Laclau (1996), in one of his most important works, examines the history and future prospects of emancipation within radical politics in the post-Cold War world, arguing against the tendency to universalize our understanding of emancipation – that is, for example, the belief that emancipation from Communism in the former Soviet states, or from political oppression in Latin America, or from economic oppression in the former Third World, or from gender and sexual oppression in the United States, all occupy the same universal framework of "freedom." Instead, as Torres (1989) does in his analysis of the relationship between the state and public policy and of the complex and uneven import of Gramsci in Latin America, focusing on the specific relations and interactions to explore the different Gramscis that emerged from actually existing conditions throughout the region, Laclau emphasizes the particularity and pluralism of emancipation*s*. Further, Laclau notes that the construction of democracy is always ongoing, a product of the continuous negotiations of hegemony and resistance. Both emancipation and liberation, then, take many forms, and are ongoing processes rather than states or conditions.

There can similarly arguably be said to be many Freires depending on one's need, and Freire can be called on as a patron saint of a wide range of beliefs and practices, some not always directly tied to Freire's actual work, to support the cause of progressive or critical education. Accordingly, this brief section will focus on Torres' understanding of Freire and the conceptual framework he took from his work, as well as the ways Torres adapted the lessons from Freire to address twenty-first century problems. As the first critic biographer of Freire, the editor of the *Wiley Handbook of Paulo Freire* (2019), and the author, co-author, or editor of over a dozen books on Freire over the course of his career, Torres is arguably the world's foremost authority on Freire and has played a significant role in the curation of Freire's work, the advancement of Freire's place within scholarly discourse, and the expansion of Freirean ideas to address late 20th and early 21st century issues in education. In particular, Torres (2014), makes a case against the widespread interpretation of Freire as a radical revolutionary, arguing instead through a close examination of his early works, that Freire is more accurately seen as a synthesizer of thought within the Western critical philosophical tradition, and Morrow & Torres (2002) further this argument through the connection of Freire and Habermas and, implicitly by extension, placing Freire as an honorary member of the second generation of the Frankfurt School in its more optimistic and hopeful critique of society and power.

As Torres (2019a) notes, Freire's paradigm of popular education as an emancipatory and revolutionary movement was itself imported from continental Europe, and particularly from Spain, itself influenced by socialist and anarchist ideologies that had long been focused on educating, emancipating, and often radicalizing the poor and working classes there toward revolution. Because education has been so formally structured and regulated within the United

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States over the past century, and because class consciousness has not had nearly the reach in this country that it has had in Europe and Latin America – in part due to vehement anti-Communist sentiment that was effectively connected to both religion and economic freedom in order to mobilize popular attitudes against it – popular education is a largely, although not entirely, unfamiliar framework within the U.S. Brought into the Latin American context, however, which had undergone severe political, social, and economic turbulence over the past several decades that had often radicalized the poor and working classes, this paradigm found fertile ground in an environment that was increasingly calling attention to the effects of inequality and imperialism within the region.

A central impulse within Freire's work is what came to be known as liberation theology, a radical movement within the Catholic Church that emerged in the late 1960s calling for the Church to contend with its morally compromised history in supporting or enabling slavery, conquest, imperialism, and colonialism, and to redirect its mission toward social justice and liberation for the oppressed (Singer, 2013; Morales-Franceschini, 2018). The counter-hegemonic approach to education that emerged within his own writings is directly tied to this broader movement's efforts to realign the teachings and commitments of the Church.

The Influence of Postcolonial Thought on Freire and Critical Pedagogy

Freire was similarly influenced by the recent work of postcolonial writers such as Frantz Fanon and Albert Memmi, who developed forceful critiques of colonialism and of its psychological effects not only on the colonized but the colonizers as well. Colonialism and imperialism were increasingly coming to be understood and critiqued during this period as not

only political and economic acts but psychological and ideological forces. Fanon, a doctor and psychologist, describes in his 1952 book *Black Skin, White Masks* the process whereby the oppressed internalizes the perspective of the oppressor, come to view themselves as lesser, and take on the performative role of whiteness in order to fit in. Yet this effort by the oppressed or colonized to fit in and belong in the colonized environment is viewed by the colonizer as predatory, which places the oppressed and colonized in a perpetually anxious and divided psychological state (Fanon, 2008).

This analysis provided a deeply instructive explanation for Freire of the role of language and literacy in the pedagogy of the oppressed – teaching the language of the colonizer implicitly further marginalizes the language of the colonized and contributes further to this psychopathology. In Fanon's next book, *A Dying Colonialism* (2005 [1959]), he offers an illustrative counter-hegemonic solution, describing how, during the Algerian Revolution, fought against France from 1954 to 1962, Algerians re-adopted traditional cultural practices that had long been branded by their oppressors as primitive and backward to resist the psychological and cultural effects of colonialism. Again, the seeds of critical pedagogy were being cast, demonstrating the necessary respect that must be shown toward traditional language and culture in order to create the possibility for social transformation. *A Dying Colonialism* and Fanon's most famous book, *The Wretched of the Earth* (2008 [1961]), offer, respectively, a historical and philosophical analysis of the process of decolonization, whereby the people can rise up in revolt against – in Fanon's formulation, through violence and armed resistance, while Freire counters with the softer power of emancipatory education – their colonizing oppressors. And although Freire differed with Fanon on the issue of violence, he agreed that the oppressed must take an

active role in their liberation and cannot have it handed to them – otherwise the psychological dimensions of colonization and oppression remain.

Albert Memmi's 1957 book *The Colonizer and the Colonized* analyzes the psychological effects of colonization on both oppressor and oppressed and explores the complex interdependent relationship between them. Memmi's major contribution, especially to Freire's subsequent development of critical pedagogy, expanded the postcolonial critique to analyze the condition of the colonizer as well, identifying the psychological damage done upon them by their status as oppressor. Domination and oppression serve as double-edged blades, and just as colonization dehumanizes and diminishes the self-image of the colonized, it also positions the colonizer inescapably and essentially as usurper – their very essence and existence is defined through that binary relationship, as the colonialist "realizes that without the colonized, the colony would no longer have any meaning. This intolerable contradiction fills him with a rage, a loathing, always ready to be loosed on the colonized" (Memmi, 1991, p. 66). This state of rage and loathing results in the dehumanization of the oppressor as well, as the possibilities for authentic human connections are closed off.

This understanding of colonization becomes especially important within the Latin American context. Freire's Brazil and Torres' Argentina are both products of it, colonized by Portugal and Spain respectively, with the vestiges of colonization still present in their languages, their architecture, and their institutions, and the attitudes of colonialism still present in the racism and classism that remained frequently visible throughout the post-colonial period. As descendants of those colonizing cultures, however, they were also sensitive to the internal and external dynamics between colonizer and colonized, oppressor and oppressed.

Freirean Critical Pedagogy

Drawing on these emergent theories from liberation theology and postcolonial thought as well as more established perspectives within the progressive, liberal, critical, and radical traditions including Marx, Gramsci, John Dewey, Herbert Marcuse, and Erich Fromm, Freire developed his critical pedagogy to focus on education as an emancipatory project toward the re-humanization of the oppressed as well as the oppressor. Within Torres' (2014) reading of Freire, it is, viewed from a broad perspective, a program toward the revitalization of democracy. This deceptively simple framework relies on a few central concepts to unpack its complexity.

First, Torres argues, Freire's work is centered within a hermeneutics of suspicion based on the belief that all social exchanges involve social domination. Hermeneutics itself has to do with how we make sense of things and interpret the world around us as well as the communication acts that we engage in and that are made toward us. The hermeneutics of suspicion, a concept from the French philosopher Paul Ricoeur developed in his reading of Freud (1977), questions the ostensible surface message in the act of communication as likely hiding some deeper, more important meaning. In this formulation, communication is primarily a cover-up to deceive us from what's really going on, and in Freire's application of the concept, the act of communication – particularly within education – carries with it implicit and coercive messages of domination. As helpful and instructive as a pedagogical exchange might be, it is implicitly communicating as its "hidden curriculum" or message an assertion and reinforcement of power dynamics between subjects. This is the nature of social and cultural reproduction in most educational exchanges: We are communicating what should be known, what should be

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known about it, who can speak, how one can speak, and what the power relationship is between teacher and student, as the additional unspoken baggage that, because it is not addressed and is therefore not opened to question and critique, becomes more powerful in its normalization.

When we are communicating this "normal" way with the poor, marginalized, and oppressed, however, these power dynamics become particularly problematic, especially in educational conditions, because they reinforce stark social, political, and economic inequalities. Pedagogical communication becomes a form of interpellation, in Althusser's (1971) sense, of implicitly and sometimes overtly constructing the identity of the other through the act of addressing them: The way you speak to me assumes and asserts the nature of our relationship and the power dynamic between us, and I then internalize that dynamic as the proper way of both understanding that relationship and constructing my self-image.

We should be suspicious, then, of the communication that goes in educational exchanges for fear that they may be reproducing inequality and oppression, however unconsciously and inadvertently. This is central to the concept of Freire's banking model of education, which presents the student as an empty vessel that the teacher deposits knowledge into – the teacher likely thinks they're being helpful, but the communication hidden within that act carries with it several other implicit messages: *Your knowledge is not valuable. Your experiences are not meaningful. Your perspective is not relevant. Sit down and listen.* These implicit communication acts are not nearly as problematic for students coming from and aiming to advance within the dominant group – they're learning both the explicit and implicit language of domination, after all, in order to maintain and reproduce that power dynamic with themselves at the top. This is why critical pedagogy has often been critiqued when applied to the developed world, because

students in, say, public high schools in Arizona – where, incidentally, *Pedagogy of the Oppressed* is banned (Wanberg, 2013) – are facing considerably less oppression than farmworkers in rural Brazil; through the educational process, it is presumed, students are provided with the opportunity for social and economic mobility and consequently need the cultural capital that the banking model provides. But, as numerous studies and reports have indicated (Haveman & Sneeding, 2006; DeAngelo & Frank, 2016; Krupnick, 2020; Tough, 2019), American education's social mobilization effect is overstated, and in many ways it contributes further to widening inequalities. This growing recognition is contributing to increased concerns about the cost and value of higher education, to be explored more fully in Chapter 5.

Freire similarly argued that education is not the lever of social transformation but can play a fundamental role in the movement toward liberation. It must first, however, overcome this culture of silence based on antidialogical action which reproduces relations of dominations (Torres, 2014). This concept of the dialogical and the antidialogical is central to Freire, as it would become for Torres: Dialogue is the essential pedagogical act for Freire, but it requires students and teachers to engage and exchange as equals, equally respectful of the other's knowledge, identity, experience, and culture, and incorporating the student's knowledge and experience.

Popular knowledge is deserving of respect but must also not be subject to condescension, which presents a central dilemma for critical pedagogy in advanced modern societies: How to demonstrate genuine respect and appreciation for popular knowledge while at the same time engaging it with scientific knowledge via the scientific humanism that Freire defended. Put more directly, this is a challenge that every critical educator within the modern university must face –

how to allow equal space for the different knowledge, experiences, and perspectives of their

students while still preparing and positioning them for intellectual and scholarly, as well as

financial, success, while not simply reproducing the capitalist order that converts revolutionaries

into docile adults with student debt and other obligations that constrain their revolutionary zeal.

In his own pedagogical practice within the Graduate School of Education at UCLA, he has

offered an embodied theoretical response to this dilemma through a sophisticated form of

Freirean problem-posing education, identifying urgent issues that we face within education as

well as more broadly within society, such as the current crisis of democracy and the rise of

nationalist populism that has largely closed off and quarantine democratic dialogue, and then

allowing each student the space and time to confront these problems from their own perspectives

and experiences.

As Lauder, Brown, & Halsey (2009) argue, in recent years disciplines such as economics

and social policy have taken over addressing and answering key questions that were once the

preserve of sociology of education, which "raises the question of what is lost if the sociology of

education is no longer making a significant contribution, in key areas, to the major educational,

social and economic issues of the day" (p. 569). This retrenchment of disciplinarity is precisely

what Torres' model is working against, calling for education to be examined from the richer and

more informed multi-perspectival and interdisciplinary lens which is able to view educational

policies, practices, institutions, and environments from a combined political, social, and

economic perspective, particularly at the macro level to understand how systems and structures

shape the field and the rules of engagement in which individual actors operate. Although

historically, at least until the late 1970s, the study of how education is structured politically,

economically, and socially and how those structures then informed educational environments and practices, the problems of education in the U.S. and globally today are too complex to be answered by a single discipline and require engagement across multiple theoretical and epistemological traditions to provide effective critiques and solutions.

Political Sociology

Even more powerfully than the tradition of the sociology of education itself, Torres' training and reading in political sociology has had a major effect on the subsequent development of his own work. Recent work over the past half-century in both political sociology and the sociology of education has focused on questions of social inequality and on the relationship between structure and agency in how social and economic inequalities are reproduced through existing systems, institutions, and processes. Sociology of education often tends to focus on microsociological issues, however, while political sociology tends to focus on macrosociological problems, in particular emphasizing the role of the state and of state policy.

Torres frequently engages with political sociology more broadly, although always through the lens of education, because his ongoing concern is the educative role of the state. Whenever we are talking about the state, we are talking about education: The state is the most powerful educational institution, conveying through force, coercion, and persuasion the concepts of citizenship, identity, social relations, economic relations, lessons of domination and oppression, and who should rightly wield power. In the Althusserian sense, to be addressed or called out by agents of power is to be structured and disciplined through that act of communication; individuals and groups are then put in the position of accepting that formulation or resisting it,

and, similarly, much of Torres' work contrasts the oppressive role of the state with acts of struggle and resistance.

In an early influential article, subsequently reprinted in the prominent sociologist of education Stephen Ball's (2004) collection of key texts within the field, Torres (1989) argues for the importance of political sociology in the analysis of public policy and, especially, educational policy. Offering a classic Marxist critique, the article contends that the state plays two key roles: on the surface, as the representative of the nation's collective and individual interests, and, more implicitly, as both the locus and the arbiter of class conflict. These roles then serve the two primary and often contradictory functions of the capitalist state: (1) To increase the accumulation of capital, in particular to benefit the economic interests of the power elite within the state, which, within the framework of class conflict, comes with the potential to increase that conflict and thus delegitimize its status among a significant portion of the population; and (2) to legitimize the mode of production and, more broadly, the sense of fairness of the economic and political system that it maintains, regardless of the degree to which it genuinely serves the interests of its citizens. Torres then uses this understanding of the state to analyze the formation of public policy with it, which he identifies as operating within that framework of power and reproduction, principally serving to meet those two key functions of the state.

The influence of the German Marxist political sociologist Claus Offe – who had notably been a student of Habermas – is significant in shaping Torres' theoretical perspective here and would play a formative role in the development of Torres' subsequent work on the state and democracy. In particular, Torres' (1989) theory of the state, which is defined, "at the highest level of abstraction, as a pact of domination and as a self-regulating administrative system" (p.

86), borrows directly from Offe's (1974) concept of the state as a "selective, event-generating system of rules" (p. 37) – that is, as an organized mechanism for the maintenance and reproduction of power. In his own work, Offe has been principally interested in the relationship between democracy and capitalism, and of the role that the latter plays in shaping, limiting, and manipulating the former. This perspective – focusing on both the role that capitalism plays in limiting actual democracy while manufacturing the perception of democracy in order to gain the consent of the governed and dominated – would be enormously influential in shaping Torres' subsequent work within the political sociology of education and, in particular, of education and education policy as both sites of struggle and vehicles for the reproduction of power.

Another, even more profound influence on Torres' understanding of political sociology, political economy, and theories of the state came during his graduate training at Stanford, with the political economist of education Martin Carnoy, his dissertation committee chair, and the economist of education Henry Levin, a dissertation committee member. Six years before Torres arrived at Stanford, Carnoy had published an influential and controversial critique of education's sorting role to serve the interests of capitalism, *Education as Cultural Imperialism* (1974). In 1979, Carnoy had traveled to Paris to study with the prominent Marxist political sociologist Nicos Poulantzas, whose influential theory of the state argued against instrumentalist Marxist analyses that contended that the state is a mere instrument of the ruling class and instead held that, although the state operates largely independent from the ruling capitalist class, it serves to maintain the orderly functioning of capitalism and therefore serves the the interests of that capitalist class. Poulantzas also presented a Gramscian analysis of the state's role in manufacturing the consent of the oppressed and subordinated in order to maintain social and

political order. Throughout Torres' time at Stanford, then, Carnoy was focused on theories of the state, particularly from a critical Marxist perspective, and, a year after Torres graduated, published *The State and Political Theory* (1984), a Marxist analysis of theories of the social role of the increasingly complex modern state. During that time, Carnoy and Levin had also been working on their 1986 book *Schooling and Work in the Capitalist State,* a Marxist analysis of the relationship between education and capitalism that critiqued and expanded on the work of Bowles and Gintis.[4]

Gramsci and Cultural Hegemony in Education

The Italian Marxist philosopher Antonio Gramsci's most influential insight for the study of education, and one that had a profound effect on Torres and the political sociology of education, is that the role of the state is fundamentally pedagogical; in essence, the state is the most effective, influential, and thorough educator within a society (Gramsci, 1971). We learn what it means to be a citizen through the educational functions of the state, as well as who is a citizen and who is not. This education then informs what is perhaps the fundamental human social operation of identifying who is "us" and who is "them," who is "good" and who is "bad," who is central to the interests of the state and who is marginalized, and who is dominant and who is subordinate. In the modern post-Westphalian political landscape, our identities, our relationships with others, and our liberty and its restrictions are defined, taught, and disciplined in the Foucauldian (1995 [1975]) sense by the state.

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[4] Torres notes that Levin told him that his critique of the book's manuscript while he was a graduate student was the strongest they received, owing to his extensive training in Gramsci and neo-Marxism (personal communication, August 2021).

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This education is reinforced by the state through both overt force and implicit persuasion, the latter of which Gramsci explains is the primary means by which democratic states "educate" and influence their citizens. This formulation provides a key update to Marx's base-superstructure model, in which the economic base – the mode of production, which includes both human labor and the means of production (infrastructure, knowledge, and physical assets) as well as the set of economic relationships within it – influences and largely determines the superstructure, which is comprised of culture, ideologies, and social and political institutions and structures, including the state (Marx, 1977). Within Marx's superstructure, Gramsci distinguishes between what can be called its coercive and persuasive elements. Coercive elements use force to achieve their goals, such as the police, the law, and the military. Persuasive elements, such as religion and education as well as units of organization such as families and unions, use ideology, influence, and what Gramsci (1971) terms cultural hegemony or "common sense" – that is, the manufacturing of perceived common sense, which is the means by which the ruling class in a society maintains domination through the manipulation of culture and its beliefs, values, and norms. If the people can accept the order of things as natural and normal, whether determined by God or by the market, even and especially if they're placed in a subordinated or subjugated position, then force becomes unnecessary and hegemony becomes self-policing and self-reproducing. Cultural hegemony, then, becomes a primary pedagogical force in representing, instilling, and reproducing the beliefs, values, and norms of the dominant group as the natural order of things.

This educational power of hegemony is distinguished from the formal operations and institutions of schooling. Schools matter, of course, especially given their role in tracking and

classifying students for specific pathways; in this spirit, Gramsci also critiqued the relationship

between classical education for the elites and vocational education for the people, a formulation

that Torres built on years later for his doctoral dissertation on the regressive social effects of

adult education programs. Gramsci's analysis also directly or indirectly informed enormously

influential classics within sociology of education such as Willis (2017 [1977]), Apple (2006,

2014, 2019), and Cookson & Persell (1987) as well as within critical cultural studies such as

Hoggart (1998), Heath (1983), and the work of Stuart Hall (2017, 2021).

Torres (1995) expands on this broader understanding of education's meaning and context

in a call to educators to take more seriously the role of the state in framing the environment of

education: "Defining the 'real' problems of education and the most appropriate (e.g.

cost-effective, ethically acceptable, and legitimate) solutions depends greatly on the theories of

the state that underpin, justify, and guide the educational diagnoses and proposed solutions" (p.

255). Torres' key insight from Gramsci that informs the perspective of the political sociology of

education is that "education, as part of the state, is fundamentally a process of formation towards

'social conformism.' Educational systems and schools in particular, appear as privileged

instruments for the socialization of a hegemonic culture" (Torres, 2016, p. 234). Another parallel

analysis is presented in Torres (1992), in which he synthesizes Gramsci's critique of social

conformism and the impact of socialization within a hegemonic culture in his reading of the

relationship between religion, the church, and society.

The principal agents within this socialization are intellectuals, which Gramsci groups into

four categories: directors and specialists, who are directly connected to the economic base and

serve to determine and organize the economic and political realities of society, and traditional

and organic intellectuals, who are connected to the cultural superstructure and serve, often unwittingly, to justify the beliefs, values, and attitudes that extend from those economic and political realities. Gramsci, like Freire, recognizes that every person has the capacity and potential to be an intellectual, but comparatively few have the social position to effectively shape the "common sense" view of society. Instead, that role is largely relegated to traditional intellectuals – scholars, writers, journalists, religious leaders, and other public figures who influence others' perspectives and, crucially, largely serve to maintain tradition and reproduce the interests of the ruling class. Organic intellectuals, meanwhile, emerge from each class or social group, albeit educated by and within the state and therefore often carrying the same common sense that the educational system reproduces, and serve to provide their group with a sense of identity, position, and purpose – again, often reproducing the values and interests of the ruling class, even against their own interests. To borrow and extend a phrase from Percy Bysshe Shelley, poets are the unacknowledged legislators of the soul, and organic intellectuals are the unacknowledged legislators of common sense for their own social groups.

Yet these hegemonic operations of dominant groups within culture and of the reproductive capacity of intellectuals are not inherently deterministic. Gramsci, like Freire and Torres after him, worked in adult education and recognized it as a fundamentally political and potentially revolutionary process. It's also dangerous, however: Gramsci's efforts toward adult education landed him in prison for most of the rest of his abbreviated life; Freire's led to his imprisonment and exile; and Torres' forced his self-imposed exile. The challenge, then, is how marginalized or subordinated groups can produce organic intellectuals that can both identify and

articulate the power dynamics that control and limit their groups, and how they can do so in a manner that avoids the repressive and potentially silencing power of the state.

Another important question is the role of Gramscian revolutionary thought outside the historical context of Marxist revolution. In an important intervention within the discourse of neo-Gramscian theory, Morrow & Torres (2001) explore the "distinctive, uneven and contested" reception of Gramsci within Latin America which developed, as they note, "in a radically different context defined by the intersection of globalization, democratic transition and social movements that cannot be understood within the framework of classic revolutionary theories of transition" (p. 331). This article, later reprinted in Borg, Buttigieg, & Mayo's (2002) influential book on Gramsci and education, both makes an implicit case for the importance of examining the confrontation of theory with distinct political and historical realities that are often different than those that the theory emerged within and was developed to address, as well as the complex and varied influence of Gramsci on class consciousness and social change throughout the region. Much of Torres' work has focused on the viability and limitations of theories of the state, democracy, multiculturalism, and social change within newly emergent and expanding conditions of globalization and postmodernity; given those developments, which curtail the potential for Marxist revolution (because the state becomes too interconnected within the globalized political and economic system to allow for the potential of a single state's overthrow within that system, and because of the fracturing of solidarity and a sense of class identification) – a revolution that Gramsci's work was specifically developed in order to realize – becomes no longer viable, making the most realistic strategy, as Morrow & Torres (2001) argue, "to prepare

subordinate classes as well as possible to participate in a world-system that can at best be *redirected,* not overthrown" (p. 340)

Torres has also been indirectly influential in shaping the landscape of Gramscian thought within the contemporary sociology of education in that one of his most prominent students from his time at the University of Alberta, Peter Mayo, is now recognized as an international authority on Gramsci and education (Borg, Buttigieg, & Mayo, 2002) and, in a distinctly Torresian move, on the connections between Gramsci and Freire (Mayo, 1999).

Habermas: Communication and Democracy

Morrow & Torres's 2002 book *Reading Habermas and Freire* stands as an exemplary model of Torres' synthesis of theories and thinkers, in collaboration and dialogue with another prominent social theorist, and his focus on connecting often seemingly disparate traditions into a broader multi-perspectival framework. The book argues for the deep connections between Freire's dialogic practice for freedom and Habermas' theory of communicative action, in that both focused on the role of dialogue and communication for the construction and continuous maintenance of democracy. Both are similarly concerned with the conditions necessary for this dialogue to occur authentically, at different levels of engagement but to similar ends. Freire was concerned with the person-to-person dialogic exchange between teacher and student and between oppressor and oppressed, examining what each brings to that exchange that can either close down or open up the possibilities for authentic dialogue and for the collaborative, mutually respectful construction of new forms of understanding and connections. Habermas, meanwhile,

focused on the public sphere, the shared space where people come together to freely discuss social problems, or what Nancy Fraser describes as

> theater in modern societies in which political participation is enacted through the medium of talk. It is the space in which citizens deliberate about their common affairs, hence, an institutionalized arena of discursive interaction. This arena is conceptually distinct from the state; it [is] a site for the production and circulation of discourses that can in principle be critical of the state. (p. 57)

What is vital in this understanding of the public sphere, however, is the recognition of the unequal dimensions of power that different political actors bring to that theater, and the different rhetorical and coercive effects that those different actors can have. This is especially the case in the contemporary age of social media, in which some influential antagonists can have an amplifying effect on others' beliefs, attitudes, and values, largely governing the outcomes of interactions within the digital public sphere (Post, 2018). Although historically the outcomes of dialogue within the public sphere have often been dominated by the interests of power, that domination is not inevitable, either through the carnivalesque upending of the dominant discourse through humor, absurdity, and ridicule (Bakhtin, 1968) or through the genuine democratic effort of addressing the inequalities that can govern dialogic exchange within the public sphere. The collective effort to clear away those structural inequities enables the possibilities for the expansion of democracy, which, even if in its purest sense it remains a utopian dream, nonetheless achieves some degree of progress through that process.

Habermas' own call to redirect rather than abandon the project of enlightenment bears a strong similarity to Torres' own distinct brand of institutionalism in resistance to the

unreconstructed Marxist call for revolution, in that the latter seeks to redirect rather than abandon the project of the democratic citizenship. In this light, and given Torres' recent work in Germany and his collaborations with German theorists Axel Honneth and Hartmut Rosa, if Freire can be thought of as an honorary member of the second generation of the Frankfurt School, Torres might fairly be thought of as an honorary member of the third generation, extending the critique of power, knowledge, and the institutions, practices, concepts, and environments that produce both.

Chapter 4: A Torres Dictionary: Key Concepts in the Political Sociology of Education

A few key concepts have been central to Torres' work throughout his career toward the construction and development of the political sociology of education – among them, democracy, the state, neoliberalism, globalization, dialogue, multiculturalism, and citizenship, which he has continually analyzed and critiqued toward an understanding of the potential of multicultural democracy within the contemporary globalized world. The theoretical analysis that has emerged in his work over the past four decades can be summarized as follows: Democracy, a perpetually utopian social and political goal, has been weakened by the effects of neoliberalism and by certain functions of globalization, which have in turn limited the power of both the state as the dominant political force and of citizenship as a significant role for addressing complex and urgent contemporary problems that are themselves largely the result of the policies and processes of neoliberal capitalism. In the face of these developments and these constraints, then, the critical dialogue that both emerges from and enables social movements is a vital force toward the possibilities of multiculturalism, itself a necessary goal within an increasingly connected and globalized world in which democracy is perpetually fragile and vulnerable, but must be enhanced and expanded toward a more comprehensive and viable model of global citizenship in order to effectively engage with and solve those complex and urgent problems.

Democracy

Historically the practice of democracy has existed more as a utopian ideal through its theories and rhetoric than in its actual manifestation. Theories of democracy, Torres argues often suffer from an idealized universalism, treating individuals and groups as undifferentiated equals,

while in practice it has consistently excluded and marginalized particular groups; this exclusion and marginalization is illustrated most recently by efforts in Texas and Georgia toward disenfranchisement of the poor and minorities through restrictive voter laws under the ruse of reducing voter fraud. Yet, although democracy remains perhaps inescapably a utopian goal in its pure form, the recognition of the inequalities inherent within the public sphere make possible the efforts toward addressing and remedying them.

Richard Rorty argued that "America is not a morally pure country. No country ever has been or ever will be, [but] in democratic countries you get things done by compromising your principles in order to form alliances with groups about whom you have grave doubts" (1998, p. 57), and that the inequities of American society had to be "corrected by using the institutions of constitutional democracy" (Illing, 2019). Similarly, the implications of Torres' work suggest that institutional power remains the most effective force for social transformation, although it's incapable of making that change itself – the state is inherently a conservative institution, primarily interested in the reproduction of the values, interest, and practices of power. Dialogue is not enough: It must be focused on influencing and potentially taking the levers of power through institutional control, principally by winning elections, inhabiting key positions of influence, and persuading others through effective engagement within the public sphere.

The State

As noted earlier in this study, Torres (1989), influenced by Offe, defines the state, "at the highest level of abstraction, as a pact of domination and as a self-regulating administrative system" (p. 86). Historically, at least since the establishment of Westphalian sovereignty, the

state has been the central, dominant agent of power that determines citizens and non-citizens and therefore is responsible for the establishment of identity of individuals in their relations with others within the state. It is therefore also, for Torres, the principal agent of education, governing both the conditions and requirements of formal schooling that largely serves as an institution of social and cultural reproduction of dominant interests as well as the deeper "hidden curriculum" through it which it teaches citizens and non-citizens alike about who they are, what their value is, what they should think about social, political, and economic issues, and what they should be doing about those issues. The state's entire function can in effect be seen as a combination of the overt threat of violence and the coercive hegemonic manufacturing of the people's consent. Yet it is still subject to the potential pressures of social movements that are mobilized through the public sphere – while it is itself incapable of and unwilling to effect social transformation, it can be compelled toward change through the rhetorical force as well as the threat of violence and resistance of social movements. Its capacity for change is diminished by the effects of neoliberalism, however, which reduce liberal democracy down to the minimalist state in order to maximize the accumulation and flow of capitalism. The state's autonomy is further threatened by some aspects of globalization, indicating the need for a broader understanding of global citizenship in order to address the increasingly urgent problems facing democracy and the environment.

Globalization

Globalization has accelerated over the past five decades to become the dominant political, economic, social, and cultural force governing policy and political decisions in nearly

every domain. It is a complex combination of economic, political, and social relations, stemming from international organizations, collective political entities, treaties, trade agreements, cultural production and consumption, as well as production, accumulation, and flow of capital outside of and separate from national jurisdiction that limits the state's political and economic control. As Torres (1998) notes, globalization is a particular threat to state autonomy and national sovereignty, replacing historically state-sponsored concepts of citizenship and identity with a broader and often more amorphous and flexible sense of solidarity, connection, and commitment. It also creates new social and economic problems to address, including immigration as well as off-shoring and the "race to the bottom" to escape taxation, regulation, and oversight that can lead to the exploitation of human rights and to environmental degradation. Globalization, then, produces both the potential for a crisis of democracy as well the possibility of the construction and advancement of a sense of global citizenship, one that creates an effective sense of belonging to the world and of solidarity in order to address increasingly pressing social, economic, and environmental problems.

Neoliberalism

Neoliberalism arose during the Cold War as a market-oriented set of principles and policies to support and advance capitalism and contain and resist the spread of communism and socialism. It was the culmination of economic beliefs that had been circulating and developing since the 1940s as what it deemed to be a return to classical liberal economics in response to the rise of both communism in the Soviet Union and fascism in Nazi Germany – each, its proponents

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argued, examples of central planning and the domination of the state over the individual (Hayek, 2003 [1944]).

Although few if any of those who espoused neoliberal policies or ideas adopted the name itself, neoliberalism has had a profound effect on economic, political, social, and cultural life in the late twentieth and early twenty-first centuries. As both a set of policies as well as an ideology, it prioritizes the privatization of economic activities over public sector management of the exchange of goods and services, including and especially what were formerly thought of as public goods. Put simply, neoliberalism proposes to solve social and economic problems through the unregulated free market rather than through government intervention – more freedom means more choice, and more choice means giving the people what they want.

This idea of freedom reframes the classic concepts of positive and negative liberty – that is, "freedom to" and "freedom from" (Berlin, 2002). As an example, laws that ban smoking constrain one's positive freedom (freedom to do whatever one wishes, thus exercising one's agency within the social structure and thereby privileging agency over structure) but they also support others' negative freedom (freedom from the effects of second-hand cigarette smoke, thus limiting the smoker's agency within the social structure and thereby privileging structure over agency). This has often been usefully if crudely explained as "Your right to swing your fits ends where my nose begins" – one's positive liberty extends until it impacts another's negative freedom.

Berlin's own example of negative liberty is "I am a slave to no man," that is, I am free from others' demands or restrictions upon me. In the wake of the Cold War, in which the anti-communist side represented communism and socialism as submission and slavery to the

state, neoliberalism arose as a market-oriented concept of freedom that understands both positive and negative liberty through an emphasis on agency rather than structure – the smoker claims both "I am free to smoke" and "I am free from intrusions that prevent me from smoking." At the macro level, capital is both free to flow and free from restrictions on its flow. The classic formulation of negative liberty – freedom from the negative economic, social, or environmental impact of others' exercising of positive liberty – is overwritten.

This sense of freedom is inherently contradictory, however. As Harvey (2005) demonstrates, neoliberalism merely exchanges one ruling class for another: It replaces the liberal state and overt rule by politicians and bureaucrats with the neoliberal state and implicit but no less powerful rule by financiers and capitalists, and in the process diminishes the potential for the state, however limited in both will and capacity, to address issues of inequality and injustice. Torres' own lived experience with *neoliberalismo* and the brutal effects of Operation Condor, a U.S.-backed campaign of state-sponsored terror and repression in the Southern Cone of South America, demonstrates the extremes of this ideology, reducing the role of the state as a repressive arm that serves principally to preserve the interests of capital at the expense of human lives and freedom.

More recently, neoliberalism as an organizing and controlling ideology that reduces everything to its value as capital has shaped an increasingly wide range of practices and institutions, including higher education. Historically, the integrity of the modern university has been linked to the nation-state, which it served by promoting and protecting the idea of national culture (Newman, 2015; Arnold, 1993). With the nation-state in decline with the advancement of globalization (Rhoads & Torres, 2006), and the university increasingly less dependent on state

funding, especially after the financial crisis of 2008-09 (Pew Research Center, 2019), higher education is in turn less engaged in the promotion or protection of national culture. As a result, universities are turning into transnational corporations driven by market forces, and, as such, must emphasize revenue and profit margins through the accumulation of market-driven research as well as its own internal and external market activities, such as housing, food, and athletics.

The theoretical construct of the university – that is, its role in theory if not necessarily in practice – has historically been utopian, with its goals by design exceeding its capacity. This concept is part of the Freirean and Habermasian concept of dialogue, captured also by Pratt's (1991) concept of the contact zone "where cultures meet, clash and grapple with each other" (p. 34). This role of the university as the facilitator of dialogic transformation is undermined by the encroachment of neoliberalism in the governance of higher education, as Torres (2011) argues: "Neoliberalism has utterly failed as a viable model of economic development, yet the politics of culture associated with neoliberalism is still in force, becoming the new common sense shaping the role of government and education" (p. 177). Torres argues that the ideological component of neoliberalism has created a "new common sense" that has brought instrumental rationality fully into the governance, management, assessment, and budgeting processes of higher education, in particular moving toward the principles of efficiency, accountability, competition, and privatization.

Extending this concept, as higher education is increasingly under attack through questions of its value, relevance, and purpose in the contemporary marketplace, to be discussed more fully in Chapter 5, the elevation and entrenchment of accreditation can be seen as a response to the growing legitimation crisis that the system has faced over the past three decades.

Legitimation crisis, as Habermas (1975) argues, refers to the decline in public confidence in the administrative capacity of states or institutions – as the costs of college rise and the benefits are called more and more into question, trust in the value and purpose of higher education diminishes. The response has been the enforcement of an academic version of structural readjustment policies, rationalizing the system through the prioritization of marketplace efficiencies, to be able to counter those questions with quantifiable results. Students' choice of major becomes increasingly governed by marketplace concerns, especially since the financial crisis of 2007-2008 as they look to enter the workforce in an uncertain and unstable economy. Meanwhile, university support for and recognition of research is increasingly prioritized toward knowledge that can be commodified and monetized, especially as state and national economies adjust their own economic priorities (Torres, 2011; Rhoads & Torres, 2006).

This transformation comes with risks for the concept of global citizenship, as the modern global university has replaced the nation-state model, not with a global model, but with a transnational corporation model. With the decline of the university's role in support of the nation-state and thus the decline of its role in the shaping of citizenship within the state, a vacuum has been left in the shaping of citizenship itself, filled by other, increasingly powerful means of informal educational processes, in particular social media and politicized media. This field of informal education becomes its own marketplace in the competition of ideas, subject in the digital age to the viral proliferation of misinformation and disinformation, but offers no master narrative that reinforces a coherent sense of citizenship itself in the globalized world. This challenge is in part what Torres' formulation of global citizenship works to address, in both utopian and realistic forms.

Social Movements

As with all utopian impulses, the push for social transformation often comes with a goal or destination but without a blueprint or road map. The interconnections between dialogue and social movements serve as a partial map to understand the mechanisms and possibilities for change, however. In their chapter on the state, social movements, and education in the forthcoming updated edition of *Comparative Education: The Dialectic of the Global and the Local* (Arnove, Torres, & Misiaszek, in press), Morrow & Torres provide the following definition as a baseline understanding of social movements and the tools they provide to enable the possibilities of change:

> A social movement is a collective actor constituted by individuals who understand themselves to have common interests and, for at least some significant part of their social existence, a common identity. Social movements are distinguished from other collective actors, such as political parties and pressure groups, in that they have mass mobilization, or the threat of mobilization, as their primary source of social sanction, and hence of power. They are further distinguished from other collectivities, such as voluntary associations or clubs, in being chiefly concerned with defending or changing society, or the relative position of the group in society (Scott, 1990, p. 6).

The distinguishing characteristic of social movements is the flexibility and dynamism of their collective action: They organize around a single issue or related set of issues and respond to specific conditions and contexts and can quickly dissolve or reorganize around other issues, and in all cases their power rests in the act or possibility of mass mobilization. Morrow & Torres qualify this definition with several points, however. First, mass mobilization can be effectively

concentrated within local contexts, but as awareness spreads to broader contexts it can lead to complex and often unpredictable reactions, either from opposing groups, the broader public that is less engaged with or invested in the issue, or controlling interests of power, including the state.

Second, because the definition does not explicitly acknowledge that social movements are collective actors within civil society, it suggests that they operate independently of both the market and the state; as the political sociology of education has demonstrated, however, all actors are embedded within the state and therefore subject to both the implicit and explicit pedagogy of the state in its social and cultural reproduction of the interests, processes, and mechanisms of power. Social movements are therefore necessarily part of civil society, albeit distinguished from other components of civil society through their public criticisms of the failures of existing democratic institutions to effectively address their key issues.

And third, the definition does not adequately acknowledge the role that political exclusion from democratic representation plays in motivating collective mobilization – that is, from one perspective, the failures and limitations of democracy give rise to the demand for social change, but from the perspective of the political sociology of education, these failures and limitations are inevitable and necessary features of capitalist democratic states, and social movements indicate instead the failure of hegemony and the reproduction of "common sense" to manufacture consent and contain resistance. As Morrow & Torres note, a more recent definition captures this latter sense: "A social movement is an excluded collectivity in sustained interaction with economic and political elites seeking social change" (Almeida, 2019, p. 6). This definition has the added advantage of acknowledging the dialogic role that social movements play and

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recognizing the rhetorical power that they wield for persuasion toward resistance against that "common sense."

In effect, social movements serve as a form of non-formal public education, operating outside the institutional structures of schooling, which itself to a greater or lesser degree unavoidably reflects and reproduces the interests of the dominant class. As Morrow & Torres (in press) recognize, however, higher education plays a key role in

> providing *resources for* social movements, taking often conflicting forms such as the following: providing foundational and innovative ideas; research that may facilitate justification in the public sphere, especially when academics embrace roles as public intellectuals; and, conversely, research whose evaluative and critical implications might contribute to reflexivity and self-criticism within movements or have implications for their de-legitimation in some cases.

In effect, the chapter provides both an extended critical analysis of a range of social movements – identity-based movements organized around issues related to gender, race, sexuality, class, or ability; student movements; teacher activism; critical pedagogy; and subaltern social movements, among others – and a call for further research into the specific dynamics, conditions, mechanisms, and environments of social movements, in both formal institutional and non-formal contexts, to better understand the potential they have for social, political, and economic transformation. Social movements have always been indicative of the legitimation crisis of existing democratic institutions and processes, revealing their failure to adequately address issues of inequality, injustice, and, increasingly, environmental collapse; given the framework of the

political sociology of education, which recognizes the inability of the institutions and structures of the capitalist state to internally change toward equality and justice.

This research becomes even more urgent given both the current threats to democracy in the U.S. and throughout much of the world as well as the increasingly pressing threat of environmental catastrophe. The state, then, must be pressured by forces that are separate from its own mechanisms and institutions. This may appear to be an inadequate answer from a traditional Marxist perspective, which would argue that social change can only be effectively achieved through revolutionary transformation, but, having lived through several coups in his earlier years in his native Argentina, Torres recognizes implicitly that, for better or worse, the state is all we've got; the revolutionary impulse can often lead to violent backlash and repression, so when the conditions of democracy are destabilized and fragmented, the outcomes can be wildly unpredictable. In essence, Torres is an institutionalist rather than a revolutionary, focusing his attention on the formal institutions and mechanisms for restoring and revitalizing the democratic state and, more recently, global democracy and global citizenship.

Multiculturalism

One of the inevitable effects of the increasingly free global flow of capital is that the flow of human capital follows. This has been demonstrated by the waves of European immigration in late nineteenth and early twentieth century Argentina as well as the several waves of immigration throughout American history, in addition to the troubling legacy of the slave trade that dramatically affected the populations of the U.S., Africa, and Latin America. Economic activity has created diverse populations, who each bring their own individual and collective histories, perspectives, and cultural practices. This then creates the potential for social conflict, both

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through the marginalized groups' demand for recognition and equality in the face of historical

inequities, which threaten the monopolization of power that the ruling class often feels is their

natural right, as well as between competing lower classes, especially during times of crisis or

economic downturns when there is growing anxiety over the diminished pool of resources,

whether real or perceived, as well as the perception of a zero-sum game of rights and privileges.

In the face of these challenges, theories of multiculturalism, as Torres argues, have

offered compelling progressive visions of inclusiveness and social justice, but they have been

largely ill-equipped to effectively address the complex realities of contemporary capitalist

democracies. What is needed, then, is

> a theory of multicultural citizenship that will take seriously the need to develop a theory
>
> of democracy that will help to ameliorate (if not eliminate altogether) the social
>
> differences, inequalities, and inequity pervasive in capitalist societies, and a theory of
>
> democracy that will be able to address the severe tensions between democracy and
>
> capitalism, on the one hand, and social, political, and economic democratic forms on the
>
> other. (Torres, 1998, p. 5)

Citizenship

Similar to theories of democracy, theories of citizenship have been historically limited by

their tendency toward universalism, emphasizing themes of homogeneity and assimilation at the

expense of cultural identity and difference, which are vital for both the integrity and recognition

of the self and one's sense of belonging as well as the potential for the state to evolve toward an

enhanced democratic practice. A more adequate theory of citizenship must take into

consideration these vital differences while also identifying the ways that we are an "us" in order

to compel each other toward two necessary practices: first, the willing compromise, and the

belief that others will do the same, of one's values, interests, and principles with the

understanding that it is necessary and productive toward the common good; and second, the

willing participation in collective action to address the increasingly urgent problems faced in

both local and global political, social, economic, and environmental problems. This concept of

critical global citizenship borrows from Freirean and Habermasian concepts of dialogue and

communicative action in order to construct a global "public sphere" that allows for dialogic

exchange on a relatively even playing field, and one that recognizes the value of difference and

of multiple perspectives toward the collective response toward these problems, as well as to the

recognition and determination of the rights and responsibilities that accompany this more

effective concept of citizenship.

Critiques

Torres frequently works at a high level of theoretical abstraction, which can make it

challenging to apply his arguments to specific conditions. There is also the continued risk of

universalization of many of these central concepts, treating political and economic entities and

operations as an undifferentiated abstraction rather than as specific and contextualized agents and

processes; one notable exception, however, is his co-written book (O'Cadiz, Wong, & Torres,

1998) on Freire's work as secretary of education of São Paulo from 1989 to 1991, which serves

as a model for grounded and applied analysis of Freirean pedagogy within a specific historical

context and, more broadly, of the complex and unstable alliances between social movements and the state.

When writing about utopia, as its literary tradition would indicate, there is also the ever-present tendency to describe its landscape without providing the map or directions, and Torres' construction of global citizenship and global citizenship education can arguably be subject to that critique – in effect, we are presented the goal without the guide. This, however, can more adequately be seen as the theoretical extension of Freirean dialogical practice, in which any utopian destination that is presented by its theorist as whole, ready-made, and attainable serves as another form of power and domination, controlling the construction of utopia. Instead, rather than providing prescriptions, Torres' work amounts to critical *interventions* within the discourse of power, knowledge, education, and citizenship; they stand as both efforts to clear the theoretical space of confusions and limitations in order to open up the possibility of more effective dialogue and as invitations to engage dialogically with the problems, implications, and goals that he presents, rather than as fully realized brochures for utopia, since, as he implicitly conveys, the road to utopia is built collaboratively, continually and eternally.

Chapter 5: Applied Political Sociology of Education

To demonstrate how Torres' interdisciplinary framework for the political sociology of education helps to critique educational issues and problems within their broader political, social, and economic context and offer potential, if perhaps utopian, solutions, this chapter will apply that framework to two pressing contemporary problems within higher education: the mounting student loan debt crisis in the United States and the ongoing revaluation of higher education itself. Both cases emphasize the processes by which neoliberalism undermines democracy, in the first case by limiting the capacity for critical thought through the revaluation of knowledge largely toward the interests of capital accumulation, and in the second case by trapping students and graduates within a system of debt and increased college costs that compel them to enter fully into the capitalist system in order to repay them. In both cases, the capacity for democracy is diminished by limiting the agency with which subjects can effectively and meaningfully engage with it. The conclusion of each provides a brief exploration of the social movements arising to respond to these threats to personal and collective agency, and by extension to democracy, in order to regain a sense of purpose and connection to humanity and to the world.

Rates of Exchange: Neoliberalism and Value of Higher Education[5]

In April 2012, in an early instance of what would become an increasingly common jeer in the coming years, *Newsweek* magazine published an article on "The 13 Most Useless Majors," a list of academic areas of study that, in the magazine's assessment, offer little to no value in the new economy. The article rounds up the usual suspects – the fine and commercial arts, the

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[5] This section is a modified and updated version of Jones, G. (2013). Rates of exchange: Neoliberalism and the value of higher education. *International Studies in Sociology of Education, 23*(3), pp. 273-280.

humanities, the social sciences – warranted by ostensibly objective data (graduates'

unemployment rates, recent earnings and long-term projected growth in earnings), and notes that

"Some, unfortunately, will be saddled with the unsettling feeling that their degree is not

marketable in this tough economic environment' but offering the list 'for students with a few

years to settle on a major'" (*The Daily Beast*, 2012). The 2007-08 financial crisis is presented up

front as a justification to reorient one's intellectual interests toward the fields that will have the

biggest bang for one's buck, realigning the value of higher education squarely on return on

investment – under current economic circumstances, the clear implication is made, it's foolish to

pursue knowledge for its own sake, especially given the enormous and continually rising costs of

college now.

Six months later, *Newsweek* itself was upended by inexorable changes in general news

consumption as it merged with the online-only *Daily Beast* and ceased print publication

(appropriately enough, journalism was number 8 on its list of useless majors). This shift to an

online-only platform came long after *Newsweek'*s retreat from hard news and its increasing

emphasis on celebrity-based and consumer-oriented coverage, but together the two events – a

trivial and condescending article on the comparative economic value of academic areas of study

and the historic end of the print run of a major US news publication, as well as its decline and

fall as a mainstream journalism institution – were symptoms of a larger trend in attitudes about

the production and consumption of knowledge: that the practices and institutions of education

and journalism that were once generally considered to be public goods, or at least should have at

best a loose and limited concern with issues of profit and loss, should instead now rightly and

inevitably be subject to and valued entirely according to market forces.

Just as important, these institutions are among the very few that make possible the articulation of alternatives to market fundamentalism and the existence of other systems of value. This combination of ridicule and inevitability – it is absurd to study anything that does not have a decent return on investment; we must inevitably bend to the will of the market in determining what is news and how it should be delivered – is, although almost certainly unplanned and unintentional, the most powerful means by which neoliberalism becomes what Torres (2011, 2013b) calls "the new common sense," the dominant logic by which contemporary societies assign value and make decisions based on economic efficiency. It also serves, as Morrow (2006) argues in his foreword to Rhoads & Torres (2006), as a stark example of how higher education has, since the start of neoliberalism's influence in the 1970s,

> been confronted with a never-ending demand for demonstrating "relevance" based on criteria increasingly distant from the original mandate of democratic responsibility. The co-optation of the open democratic university by the dogmas of neoliberal globalization theory and the local pressure of budgetary constraints have increasingly alienated the popular and social democratic forces that once supported making the ivory tower "more relevant." (p. xviii)

This co-optation is in turn a demonstration of several of Torres' (2011, 2013b) theses on neoliberalism as the new common sense in education:

- "Thesis one: neoliberalism is the new paradigm or logic-in-use that has replaced progressivism" (Torres, 2013, p. 83): As the valuation of knowledge and of majors shifts toward those with higher financial rates of return, neoliberal capitalism replaces democratic liberalism and progressivism as the organizing social logic within which

people make both personal and political choices. The knowledge worth having and pursuing is that which serves the private accumulation of wealth.

- "Thesis two: neoliberalism has deeply impacted higher education worldwide" (Torres, 2013b, p. 85). The role that colleges and universities play has transformed historically from serving as elite, exclusive institutions that reproduce power to democratic institutions that advance social change to "transnational institutions of knowledge production, change, distribution, and consumption" (p. 85), commodifying and monetizing knowledge and in turn reorganizing the university as a capitalist institution that is in the business of buying and selling knowledge.

- "Thesis three: neoliberal globalization has galvanized the model of neoliberal common sense in education" (Torres, 2013b, p. 85): As Morrow (2006) writes, "the market becomes the Trojan horse for undermining academic autonomy by ostensibly non-ideological and non-coercive means based on the interests of the 'consumers' of education and research" (pp. xxvi-xxvii). The "common sense" established by the political economy within which consumers and citizens operate influences their perception of the knowledge worth having and pursuing, as well as the opinions of thought leaders who then further reinforce that logic. Knowledge is then reframed as a market commodity to be consumed or "invested" toward one's future career and potential for financial earnings.

- "Thesis four: neoliberal public managerialism is supposed to solve the crises of higher education" (Torres, 2013b, p. 85): The modern university faces three serious crises of hegemony, legitimacy, and institution. Its hegemonic crisis stems from pressures to

produce marketable knowledge rather than other, more democratic forms of knowledge that serve non-commercial interests. Its legitimation crisis stems from the growing devaluation of college degrees through increased competition, rising college costs and the resulting questions of the comparative value of higher education, and what might be termed "degree inflation," in which, over time, higher levels of educational attainment are required for employment whose pay remains largely the same. And its institutional crisis stems from decreased financial support from the state and the attendant decline of higher education's mission toward public service. Collectively, these crises call for the heightened role of managerialism in steering education toward services that make it profitable and viable within the market economy, and thus increasing the value of those courses of study that best serve those interests.

- "Thesis five: neoliberal common sense is predicated on the power of possessive individualism" (Torres, 2013b, p. 86): Within this perspective, the pursuit of higher education is for the accumulation of social capital, cultural capital, and technical skills that position one as best as possible for entry and advancement within the market economy. There are no obligations to society or to the common good, only the investment of time and money toward one's own private interests to maximize one's value. The shift in the valuation of courses of study has been significant since the 1970s; as one example illustrates, the total number of bachelor's degree graduates with English majors declined by 40 percent from 1970 to 2019 while, over the same period, the number of business graduates increased by more than 300% (National Center for Education Statistics, 2019). While the picture is more complicated than that single example may illustrate, the

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broader point is that, over the past five decades, students have increasingly moved toward

majors with higher expected rates of financial return but lower investment in civic

engagement.

- "Thesis six: neoliberalism's common sense in education undermines the public

  responsibility of the state in promoting the 'common good'" (Torres, 2013b, p. 86):

  Summing up the neoliberal view of the role of the state, Ronald Reagan frequently joked

  that "The nine most terrifying words in the English language are: I'm from the

  government, and I'm here to help" (Reagan, 1986). Neoliberalism draws from Adam

  Smith's concept of the "invisible hand," believing that the unintended consequences of

  individuals acting in their own interest creates greater social good. This conception holds

  that the logic of selfishness best serves the public interest and requires minimal

  intervention from the state. However, the neoliberal appropriation of the concept has

  expanded significantly beyond Smith's own meaning. In *Theory of Moral Sentiments*

  (1759), Smith's major work prior to *The Wealth of Nations* (1776), Smith outlines a

  civic-minded morality that serves as the vital spirit to inform economic behavior – for

  Smith, it was not selfishness that resulted in the public good, but rather individuals

  behaving within a pre-established moral framework, with the public interest kept in mind

  alongside their own private interests. As such, neoliberalism has twisted Smith's own

  meaning and erased the necessary context for economic behavior based on empathy and

  civic-mindedness. The state has historically played a major role in establishing that moral

  context, exercised in part through educational institutions; yet, through the revisionist

logic of neoliberalism, that role has been diminished, replaced by the "invisible hand" that has itself been severed from its moral guide.

- "Thesis seven: if there is no solidarity built on the premise of the attainment of the "common good," then cut-throat competition and not citizenship collaboration is the key to capitalist development" (Torres, 2013b, p. 87): Of course, the choice of major cannot itself be seen as a full proxy for students' moral and ethical outlooks, given that a complex and diverse array of choices, interests, and needs goes into the selection of one's course of study and the purpose it serves toward one's broader civic, personal, professional, and financial goals. Nonetheless the shift in attitudes about the purpose and value of higher education, and the choices of what one studies and what knowledge is worth pursuing, can be one leading indicator of a shift in the role that students see education playing in informing their sense of civic responsibility. By reframing higher education within market logic, and reframing knowledge as a market commodity, the recent historical role of colleges and universities as agents of democracy is replaced with that of agents of neoliberal capitalism.

- "Thesis eight: neoliberalism not only reproduces existing inequalities but also creates new ones. The paradigmatic shift towards neoliberalism may be responsible for and/or has deepened larger civilization crises than could have previously been imagined" (Torres, 2013b, p. 88): The twin crises of environmental decline and the erosion of democracy are themselves the result of shift toward neoliberalism, which has in turn influenced the interests and values of what knowledge is "worth" having. By privileging knowledge that serves private interests and the private accumulation of wealth at the

expense of the public good, and of the public's ability to collectively respond to these

crises, their potential for destruction is dramatically exacerbated.

- "Thesis twelve: neoliberalism sees students as consumers not citizens" (Torres, 2013b, p.

  92): The way that people are treated can play a significant role in shaping their

  self-conception and their sense of their relationship to others. By treating students not as

  citizens to be shaped and informed but as consumers to be appealed to and sold to, the

  neoliberal university reframes their sense of the purpose and potential of civic action.

  This partly explains why a significant percentage of political action in recent years

  involves the threat of boycotts of companies that advertise on networks that in turn

  provide platforms for controversial figures – political agency is learned and understood

  largely through acts of consumption, or through the withholding of those acts.

- "Thesis thirteen: is lifelong learning for a knowledge society a creature of

  neoliberalism?" (Torres, 2013b, p. 94): The practices of non-formal and adult education,

  which historically have served marginalized populations to provide opportunities for

  social advancement, have been repurposed in recent years toward what has been

  re-labeled "lifelong learning." This concept understands education as perpetually tied to

  one's economic viability, and the need to continually maintain one's knowledge and

  skills, or to pursue new knowledge and skills, remains ever-present to ensure one remains

  an economically productive member of society. The role of adult education as a means

  for potential social change is diminished and replaced with the concepts of retraining and

  transferable skills.

Collectively, Torres' theses on neoliberalism demonstrate the various ways that the logic of neoliberalism has reframed higher education, its sense of mission, and its perceived sense of value for what it offers students. The remainder of this section explores the question of higher education's value through the lens that these theses provide.

To its credit, after publishing its attack on "low-value" majors, *Newsweek* gave editorial space to a response from one of its own writers in defense of the liberal arts; in that response, art critic Blake Gopnik (2012) offers a spirited attack on that common sense, asking

> Who's more important today, Rembrandt or the people who bought his art? Monet or the people who bought his? … [W]hich is more useless, adding another million dollars to the millions you already have, or adding a new work of art, or a new thought, to the world's store of ideas? The single biggest problem the world has today, by far, is that people in the West are used to owning and using too much, and are setting an impossible example for the rest of the planet. . . . So there's real-world, practical virtue in living modestly, "uselessly," and taking your pleasure from the thoughts and ideas you acquired in getting your "useless" degree in art or poetry or philosophy. The world will not be a better place when more people have more money and stuff. It can ONLY be better when more people have better thoughts.

Gopnik was joined by a volley of similar defenses both generic (Neem, 2012; Skorton & Altschuler, 2012; Staton, 2012) and field-specific, including philosophy (Rupp, 2013), sociology (Palmer, 2012) and anthropology (Antrosio, 2012). Their approaches vary between arguing for the economic viability of these disciplines – Rupp claims for philosophy that "jobs change. But if you teach students to think clearly first, they can do whatever else they want to do"; Staton

asserts that the liberal arts can help students "produce end products that our newly digitized civilization values" – and, arguing against economic valuation as a legitimate means of assessment, Neem (2012) declares:

> The liberal arts and sciences have no economic value. . . . Taught in the right spirit, they are useless from an economic point of view. They are designed in fact to be downright wasteful. . . . Today's students need to know a lot about how the human and natural worlds work and they need not just knowledge but the capacity to *evaluate* – that is to determine the moral value of – different goals, ideas, and policies. This evaluation requires moving well beyond the economic calculus to questions of what is *worth it* and to understanding our cultural traditions. (p. 1)

The division between these defenses of liberal arts education is striking: While they would seem to be fighting the same battle in support of the liberal arts as worthwhile fields of study, however one assigns "worth," they turn out to be fighting on opposite sides of a larger battle: what knowledge is worth pursuing, and how we should assign value to knowledge; should it be fungible – should knowledge and the pursuit of it have a reasonable expectation of financial payoff – or should the production of knowledge not be directly tied to its likely return on investment?

It is the need for defense that is itself a symptom, however – the effort to countervail the winds of mass public opinion to recognize the value of, say, the humanities as not solely a matter of return on investment. As journalist Verlyn Klinkenborg (2013) argues in defense of the English major and its ability to teach a deeper, richer sense of literacy than what is immediately quantifiable, "No one has found a way to put a dollar sign on this kind of literacy, and I doubt

anyone ever will. But everyone who possesses it – no matter how or when it was acquired – knows that it is a rare and precious inheritance."

The *Daily Beast's* article is itself based on a widely reported 2012 study by Georgetown University economists Anthony Carnevale, Ban Cheah and Jeff Strohl, who examined the employment and earning rates of graduates from both individual areas of study and from college as a whole. Their report opens with the "unavoidable" question "Is college worth it?" And while their answer is a qualified "yes," that the answer is asked at all – and is asked seemingly with heightened urgency "as we slowly dig out from the wreckage of the Great Recession," implicitly suggesting that, in an age of severe cutbacks and economising, college may well have become a luxury we can no longer afford – indicates the degree to which higher education has been reframed as a matter of financial investment. This is not surprising, of course, given the rapid increase in the cost of college – tuition has risen 27 percent over inflation in the past five years (Elliott, 2013) and public college tuition has risen 71 percent in the last decade (Gilson & Severns, 2013), which has contributed to a perspective that defines costs and benefits increasingly in terms of money invested and money gained directly from that investment.

Further, in presenting findings that amount to advice about the rates for return on investment for particular majors, the Georgetown study assumes that all majors are created, and sent out into the world, equal. It may be true that, as the cliché goes, organic chemistry has made as many English majors as Shakespeare has, or that the humanities are often repositories for college students who take longer to figure out their way and their place in the world – or perhaps, through their course of study, discover that there are perhaps larger questions than can be answered on the bottom line. In effect, the study's findings more closely resemble those of a

more recent study by the American Association of University Women on gender pay inequity

(Corbett & Hill, 2012). Within one year after graduation, their report concludes, men make on

average $42,918 while women make $35,296. And while the study acknowledges that some of

this disparity stems from women's particular choices – occupation, field of study – nonetheless

"about one-third of the gap remains unexplained, suggesting that bias and discrimination are still

problems in the workplace." This is not to suggest that there is anything resembling a bias

against certain majors in the workplace, but rather, as seen in the AAUW report, that market

logic is perhaps not the best assessor of value if we are looking at employment and income rates

to determine the worth of a particular field of study – that the means of assigning value is

perhaps flawed, rather than what's being assessed.

Nonetheless, the current economic climate has had a significant impact on students'

choice of major, in large part due to its likely return on investment, and indeed there is

widespread questioning of the value of college in the first place. An April 2012 report by the

Associated Press found that

> While there's strong demand in science, education and health fields, arts and
>
> humanities flounder. Median wages for those with bachelor's degrees are down from
>
> 2000, hit by technological changes that are eliminating midlevel jobs such as bank
>
> tellers. Most future job openings are projected to be in lower-skilled positions such as
>
> home health aides, who can provide personalized attention as the US population ages.
>
> Taking underemployment into consideration, the job prospects for bachelor's degree
>
> holders fell last year to the lowest level in more than a decade.

The study relies on Department of Labor assessments of the level of education required to do the job in 900-plus U.S. occupations, which were used to calculate the shares of young adults with bachelor's degrees who were "underemployed." And, while college graduates still earn significantly more than those with just high school diplomas (James, 2012), Harvard economist Richard Freeman notes that "You can make more money on average if you go to college, but it's not true for everybody. . . . If you're not sure what you're going to be doing, it probably bodes well to take some job, if you can get one, and get a sense first of what you want from college" (Associated Press, 2012). Similarly, Andrew Sum, who analyzed the numbers for the AP study and is director of the Center for Labor Market Studies at Northeastern University, concludes that college majors should be developed around and selected for their return on investment: "Simply put, we're failing kids coming out of college. . . . We're going to need a lot better job growth and connections to the labor market, otherwise college debt will grow" (Associated Press, 2012).

In light of the college debt crisis, pushed to its extreme, this logic produces results like the Thiel Fellowship, which funds young entrepreneurs *not* to go to college and instead develop their business ideas (Wieder, 2011). The fellowship was established by PayPal co-founder and early Facebook investor Peter Thiel precisely to push back against the mindset that college is simply the default choice after high school, which he believes has produced the next economic bubble: "It's what you've been told all your life, and it's how schools rationalize a quarter of a million dollars in debt" (Lacy, 2011). And indeed, the looming student loan debt crisis has led to a collective rethinking of the value of college (Coleman, 2009) as well as a rethinking of whether college makes good on the investment – whether it ultimately pays off (see e.g. Bloomberg's PayScale report, which studies the 30-year investment returns for over 1000 U.S. colleges and

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universities), as *New York Times* columnist Bruni (2012) argues: "Because of levitating costs, college these days is a luxury item. What's more, it's a luxury item with newly uncertain returns."

There have also been creative solutions to the impending crisis, such as Oregon's "Pay It Forward" proposal, which would "provide access for all Oregonians to a debt-free degree" by allowing graduates to pay for their education as a percentage of their future earnings (Kuttner, 2013). And, certainly, there is widespread rethinking of what higher education can and should deliver in order to make it more attractive and affordable to prospective students, not just as an economic investment but as an environment to foster meaningful intellectual and personal growth, that suggests that it will likely be able to adapt to shifts in the economy and labour market to still be the route of choice to enable advancement.

Yet, the Georgetown study's initial assumption, along with many of the other arguments examining the value of higher education, is symptomatic for another reason – the assault on the traditional value and purpose of college. Higher education has undergone frequent changes in its purpose and scope – from its early days as preparatory school for the priesthood or a preserve for the wealthy and elite to its shift in emphasis on graduate research in the nineteenth century German model to the mass expansion and democratization in the mid-twentieth century, it has long evolved to meet the cultural, social, political and economic needs of the times. And certainly, it is too entrenched economically, politically and culturally now to be severely impacted – there will likely be a post-bubble retraction followed by a shift in new directions to meet new needs. And, finally, the assumption that a discipline's worth, or even the value of

education as a whole, can be measured in its graduates' eventual salaries is nothing new, of course, and is indeed one key component in why people have always pursued higher education.

But the larger concern is over the collective assault on the university as a quasi-utopian space – in Mary Louise Pratt's term, the "contact zone," the "social spaces where cultures meet, clash and grapple with each other, often in contexts of highly asymmetrical relations of power" (1991, p. 34) – where these very questions of value can be debated. Even arguments in support of the traditional model of higher education now often engage in a discourse of defensiveness, indignantly pointing to, for example, all that the humanities can and still do, yet ultimately validating the terms of the debate as set by neoliberal thought: "We are *too* valuable! Our graduates make good salaries!" This argument is similar to Francis Fukuyama's in *The End of History and the Last Man* (2006): We have reached the end of history in the battle of ideologies, and neoliberalism has won, determining now what value and worth are.

College and universities have long been the protected spaces where such things are debated and determined. The line of argument in examining what college is worth now – not the question itself, which is entirely legitimate and necessary, but the sole focus on return in investment in assessing value – joins in the collective undermining of institutional and academic authority that has become part of conservative discourse, itself conjoined with the neoliberal economic agenda to establish market logic as the sole governing logic. Education, which is the last bastion of resistance for working out alternative discourses and values, is itself under assault in order to undermine its position – not least because of its own doing, with dramatically rising costs, student loan debt and interest rates, coupled with a shaky job market and an escalating arms race of what degrees are required for jobs. This is in part what has given rise to the

for-profit industry in education, which in many ways has been able to respond more deftly to these concerns by operating within a purely neoliberal framework of educational value based on return on investment.

The question, then, is what areas of resistance remain, and what is done to protect those areas. Journalism and higher education are both under considerable assault as independent spaces of critical inquiry, although the destabilization of the traditional economic structures of both create potential new avenues that could themselves destabilize the increasing control that neoliberal discourse has had. Ultimately, this scenario makes clear, we must continue to look to alternative spaces and discourses that allow for the growth of other ways of thinking, understanding and assessing and assigning value that stand outside the purely market logic of neoliberal discourse.

This is where the perspective of the political sociology of education becomes vital, by questioning the process of how citizens and the concept of citizenship are constructed through contemporary models of education, and of higher education especially. Given current conditions, the prospects may seem limited for a systematic rebellion against the encroachment of instrumental rationality and academic capitalism. And, indeed, these developments are not new; frequent lamentations have been sounded over the past several years over what appears to be a dramatic shift in students' values and life goals. In one representative critique, Bauerlein (2015) notes that the CIRP Freshman Survey, which, since 1966, "has provided data on incoming college students' background characteristics, high school experiences, attitudes, behaviors, and expectations for college" (Higher Education Research Institute, 2021) found that, when asked to rate the importance of being well off financially, the percentage of respondents who answered

"very important" or "essential" has risen from 38 percent in 1967 to 82 percent in 2015, while those who regarded "developing a meaningful philosophy of life" as "very important" or "essential" has fallen steeply over the same time period, from 86 percent in 1967 to 45 percent in 2015. The two values have traded places, an alarming indication of the widespread reframing of students' attitudes about the purpose of life as well as of education.

The same survey, however, also found that two other values remained consistently high in responses of "very important" or "essential" since it first began asking the question: "helping others in need" and "raising a family" (Millerd, 2020). In essence, *take care of others, both those close to us and those who need help* – values that fit well within the model of global citizenship in its aims to create a more utopian model of humanity and restore a sense of meaning and purpose to the relationships people have with each other as well as to their environment. These responses suggest that the situation is not nearly as dire as Bauerlein and similar critics fear, and even the increase of "being very well off financially" indicates a rational response to changing economic conditions – as the next section will show, the cost of college also rose dramatically from 1967 to the present, well out of proportion to the price increases of other goods and services, arguably forcing a re-evaluation of the purpose of college and, indeed, the purpose of life relative to its costs.

"Never Let a Serious Crisis Go to Waste": American Higher Education in the Age of Debt and Pandemics

The effects of neoliberal policies on higher education in the United States have dramatically eroded public financial support over the past four decades, increasingly forcing institutions to find alternative sources of revenue and to make difficult financial decisions

including cuts to programs and employment to manage their budgets (Torres, 2011; Rhoads & Torres, 2006; Fabricant & Brier, 2016; Mintz, 2021). This has meant in many cases raising the cost of tuition and reducing or reorienting services toward more market-friendly practices to attract students from a diminishing pool of candidates in an increasingly competitive marketplace. These transformations, in turn, have led to a sharp increase in student loan debt, which, by limiting opportunities for graduates, has caused a revaluation of the "worth" of higher education among parents and students who, as the next section will argue, have increasingly defined its value increasingly in economic rather than civic, intellectual, or moral terms (Torres, 2015). These effects have also exacerbated pre-existing structural inequalities that higher education had long been presumed to address (Tough, 2019). As Mitchell (2021) notes,

> The [student loan] program was supposed to reduce inequality, leveling the playing field for society's most disadvantaged. Instead it has increased inequality, harming many of the borrowers it was intended to help. Minority students struggle the most with student debt. Black households with student debt typically owe far more than households of any other race. Black borrowers are three times as likely as white students to default. Nearly 4 in 10 Black borrowers who started college in the early 2000s defaulted. (p. 6)

Even students at community colleges – long thought of as "democracy's colleges" (Boggs, 2012) and positioned "at the heart of the American dream" (Obama, 2015) for the affordable access they provide to higher education and thus, presumably, social and economic mobility – face significant and life-altering debt; one study found that 38 percent of students who took out loans at community colleges defaulted within five years (Quinton, 2016).

Collectively, these pressures have forced significant changes to the landscape of higher education for both students and institutions. As of July 2021, over 43 million Americans owe more than $1.7 trillion in federal student loans, for an average of nearly $40,000 per borrower (Board of Governors of the Federal Reserve System, 2021; Federal Student Aid, 2021), and private student loan debt accounts for an additional $137 billion (Hanson, 2021), for a total of nearly $2 trillion owed. The total average cost of attending a four-year institution in the United States now exceeds $110,000, which, adjusted for inflation, is over twice the cost in 1986 (National Center for Education Statistics, 2021). The cost of higher education has increased at a pace almost twice that of wages over that time (Maldonado, 2018) and has significantly exceeded the price increases of other household expenses such as health care or new cars (Mitchell, 2019; Mitchell, 2021).

These increased costs have heavily impacted access and opportunity, furthering economic inequalities especially along racial and class lines (Mishory, Huelsman, & Kahn, 2019) and contributing to increased income inequality post-graduation (Ahmed & Kabir, 2019). As a result, "the great equalizer" has become the great polarizer (Tough, 2019). Crippling student loan debt has altered career plans and impacted and limited life choices – getting married, having children, buying a home, starting a business, pursuing lower-paying but more fulfilling careers. Rising questions about the cost/benefit analysis of higher education have also led to the emergence of alternate pathways that bypass traditional education.

Indeed, most institutions themselves are not necessarily benefiting from these cost increases, to the point that Harvard business professor Clayton Christensen predicted in 2013 that, within the next decade and a half, "a host of struggling colleges and universities – the

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bottom 25 percent of every tier … will disappear or merge. . . . Already traditional universities are showing the strains of a broken business model, reflecting demand and pricing pressures previously unheard-of in higher education" (Christensen & Horn, 2013). More recently, Zemsky, Shaman, & Baldridge (2020) predicted that over a hundred private colleges and universities with enrollments below 1,500 would likely close within the next five years. In the wake of the COVID-19 pandemic, Zemsky, a higher education scholar at the University of Pennsylvania, increased his prediction to 200 institutions (Korn, Belkin, & Chung, 2020). Other higher education researchers and analysts (Doyle, 2020; Kelchin, 2020a; Kelchin, 2020b; Vedder, 2020a; Kroger, 2020a; Kroger, 2020b) have made similar dire forecasts ranging between 100 and 1,000 school closures, repeatedly pointing out that the financial circumstances of many institutions were already deeply troubled before the pandemic due to precipitously declining enrollments and massive cuts in funding from state governments (Butrymowicz & D'Amato, 2020; Whitford, 2021a; Whitford, 2021b). While, as of August 2021, most of these predictions have yet to materialize, the impact on higher education's labor force has been near-cataclysmic, with hundreds of thousands of workers already furloughed or terminated by the fall of 2020 (Bauman, 2020) and over 650,000 by spring 2021 (Kroger, 2021), even though the economy had largely recovered by that point.

The latter development evokes former Obama White House chief of staff Rahm Emanuel's infamous statement in the wake of the 2007-08 financial crisis, one that he reasserted in the early days of the Covid-19 pandemic: "You never want a serious crisis to go to waste. It provides the opportunity to do things that were not possible to do before" (Emanuel, 2020). Emanuel's statement has had an extended shelf life due to its endless mutability in a polarized

political climate, used either to justify nearly every action in the wake of disaster or, conversely, to condemn nearly every action made by the opposing side, but the austerity measures taken especially by well-endowed and elite institutions in response to the crisis appear to be a suspicious overreaction. For example, Johns Hopkins University reported in October 2020 that pandemic-induced austerity measures would remain in place for the foreseeable future despite a budget surplus of $75 million for the fiscal year ending 2020 (Limpe, 2020). Other highly selective schools reported even greater budget surpluses while still keeping employment significantly below pre-pandemic levels (Svirnovskiy, 2021). Meanwhile, colleges and universities initially pushed back on calls to reduce tuition for students while classes were administered online during the pandemic, citing a significant reduction in revenue due to the disruption of lucrative campus services such as housing and food, and only reversed their position in order to entice students back after seeing sharp declines in enrollment (Dickler, 2020).

The pandemic did not cause the current educational crisis like an unexpected hit to an otherwise healthy patient. Rather, it exposed and exacerbated an array of pre-existing conditions, revealing structural inequalities that extend back decades. In 2019, for example, almost a thousand schools were nearly financially insolvent (Fain, 2019). Many colleges and universities still had not recovered from the 2007-08 financial crisis – even before the pandemic, average state spending on higher education was down 17 percent from pre-recession levels (Strauss, 2020; Illing, 2020). Meanwhile, nearly three-quarters of the teaching workforce in higher education were non-tenure-track: "94 percent of the net increase in college professors hired to teach the millennial generation [over the past decade] were contingent" (Carey, 2020).

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The steps taken by the state government of North Carolina from 2011 through 2015 to gut

public higher education (Hogan, 2015), including using the resulting financial crisis to justify

massive cuts to state funding for education, the removal of tenure and replacing it with part-time

and contingent work, and the elimination of financially underperforming programs, offered a

blueprint that states and universities would increasingly take up a few years later during the

pandemic. The dean of the College of Arts and Sciences at the University of Colorado at Boulder

was more open than many about how the pandemic could be used as justification for what was

called a "years-long trend away from tenure-track hiring" (Flaherty, 2020), announcing plans in

late 2020 to replace 50 tenure and tenure-track faculty members with 25 adjuncts who would

teach more for less pay (White, 2020). Other colleges and universities, although less vocal about

drawing explicit connections between pre-pandemic goals and post-crisis justifications,

announced similar plans to cut programs and eliminate tenure lines and replace them with

contingent faculty, justified in the light of budget shortfalls (Sainato, 2020; Chronicle Staff,

2020; Belkin, 2020; Warner, 2020; Vedder, 2020b). Collectively these actions serve as a model of

social control and as a means to diminish the autonomy of faculty, including closing off the

potential of trade unionism.

There was an important precedent for the weaponization of higher education's budgeting

and financing, however. In 1967, then-California governor Ronald Reagan responded to what he

described as the state's growing budget crisis by suggesting that "everyone needed to tighten

their belts" and, although he would do nothing to harm the state's stellar public higher education

system, "we do believe that there are certain intellectual luxuries that perhaps we could do

without." When asked what "intellectual luxuries" he was referring to, he provided the example

of a course at the University of California at Davis on organizing political demonstrations. "I figure that carrying a picket sign is sort of like, oh, a lot of things you pick up naturally," he explained, "like learning how to swim by falling off the end of a dock." Taxpayers, he argued, "shouldn't be subsidizing intellectual curiosity" (Barrett, 2015).

This was not merely the language of belt-tightening fiscal prudence, however. Reagan had launched his political career attacking student protests against the Vietnam War at the Berkeley campus of the University of California, demanding, "Get them out of there. Throw them out. They are spoiled and don't deserve the education they are getting. They don't have a right to take advantage of our system of education."[6] He blamed not only students; he also found the faculty and administration overly permissive or even supportive of the student protestors, and subsequently ran for governor partly on the promise to "clean up the mess at Berkeley" (Rosenfeld, 2012; Kahn, 2004). Almost immediately after he was elected, he fired the University of California's president, proposed that its budget be cut by ten percent, and suggested that it charge tuition for the first time in its history (De Groot, 1996; Kahn, 2004). He was explicit about the purpose of the latter move: "Get rid of the undesirables," he said – "Those there to agitate and not to study might think twice before they pay tuition" (Taylor, 2020).

Reagan's rhetoric and policy proposals were direct assaults on a long-dominant if not always well-articulated or thoroughly realized theory guiding higher education – that its central

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[6] Reagan's response had an international precedent, albeit a more violent one, in the Night of the Long Batons *(La Noche de Bastones Largos)* in Argentina in 1966, when the Ongiana administration sent police to violently remove faculty and students who were protesting against assaults on academic freedom and independence. It would also inspire a similar response a year later against the student protests in Paris in 1968, collectively indicating the way that the state sought to control and limit the development of student movements within higher education. Several university buildings and campuses developed after 1968, including the new main campus of the State University of New York in Amherst, a wealthy suburb of Buffalo, which was the site of several protests during the late 1960s. The architecture of higher education in the aftermath of those programs was frequently designed with the interests of crowd control in mind.

purpose was to foster and cultivate intellectual curiosity and to prepare students to engage meaningfully in civic life. This theory would suggest that the democratic state has a vested interest in the role that higher education plays in supporting and enabling that process – a healthy democratic polity, and a healthy civil sphere, is dependent on well-educated citizens prepared and able to engage productively in civic dialogue. From the start of his political career, however, Reagan presented a counter-theory: The purpose of higher education is to prepare students for jobs and careers. This proposal implied that higher education should depart from the ethical and moral fields on which they had long attempted to hold claim, leaving them to even more traditional institutions such as the church and the family, and focus on, indeed, what Reaganism would see as the primary purpose of the state and its institutions: economic productivity, and eliminating the obstacles to economic productivity, or at least economic productivity that serves the interests of capital.

Reagan implicitly presented a corollary to his theory, which is that low-cost or zero-cost higher education creates moral hazard – students are disincentivized from acting in good faith in pursuit of their education because they take little to no financial risk in the process; taxpayers should not have to "subsidize intellectual curiosity," but rather, in order to ensure responsible behavior, students (or their families) should be expected to take a major stake in the investment made on their behalf to turn them into economically productive members of society. Higher education was thus subtly turned from a public good, which it had increasingly been seen as in the post-World War II era (if in ideal form rather than actuality), into an increasingly private good, a central argument in much of Torres' work (Morrow & Torres, 1990; Torres, 2011a; Torres, 2011b).

With the rhetorical power of his law-and-order campaign vow to "clean up the mess in Berkeley," Reagan played the role of Gramscian organic intellectual – at least initially, before taking on the actual coercive levers of power after his election as governor of California and, later, President of the United States – in shifting the "common sense" view of higher education and its purpose. He also effectively began the shift in what is sometimes referred to as the "Overton window," a concept from the libertarian policy analyst Joseph Overton that would increasingly be taken up by conservatives throughout the 1990s and 2000s and that offers a theory to explain both the range of acceptable public positions on a given policy issue and the process whereby that range can be widened, narrowed, or moved to the political left or right. Reagan had taken what at the time was a radical stance – the *Los Angeles Times,* purporting to speak for many, wrote at the time a harshly critical editorial in response to Reagan's dismissal of "intellectual curiosity" – and, while he was not necessarily able to achieve all of his policy proposals, was able to open up space for others to follow in his wake and thus enabled the possibility for more to be achieved toward his position than would have been available before his speech.

This was a stark transformation from the prominent moral and social standing that higher education in the United States had enjoyed in the two decades following World War II. Immediately following the war and throughout much of the subsequent Cold War, American colleges and universities were seen as fulfilling a patriotic mission, serving as engines of technological and economic innovation to establish and advance American dominance as well as providing vital retraining for returning veterans. As a reward for the patriotism of those veterans and of higher education more broadly – and as a means to maintain political stability in the

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immediate postwar years and avoid a repeat of the Bonus Army riots that followed the federal

government's failed promises to provide financial security to veterans after World War I

(Mitchell, 2021; Manchester, 1973) – the Servicemen's Readjustment Act of 1944, better known

as the G.I. Bill, provided the first-large scale federally funded program to finance the cost of

higher education for students. It also provided a potential template for the federal government's

dramatic expansion of aid to students in the decades that followed, one that viewed higher

education as a public good, like primary and secondary education, that becomes increasingly

necessary as a state further advances its industrial, technological, economic, and cultural

development. As a result of the gradual ideological shift in the U.S. from the high tide liberalism

in the Johnson years to the neoliberalism and conservatism of the Nixon, Ford, and Reagan

years, however, this template was soon discarded in favor of the view of higher education as a

private commodity, a view that increased in coming years (Torres, 2011a).

The establishment of compulsory education, along with the regulations and curriculum

that govern and shape it, is one of the principal functions of the state and a primary means

through which it reproduces itself socially, culturally, and politically to achieve its goals. In

advanced states especially, the funding of non-compulsory post-secondary education becomes an

equally powerful means to establish, communicate, and inculcate fundamental values and norms

about the value of education and knowledge, the role of the citizen in cultural, political, and

economic activities, and, as became increasingly apparent by the mid-twentieth century, social

and economic inequality. Significantly, the next major step in federal intervention in higher

education funding came in the wake of the Sputnik launch, when Vice President Lyndon Johnson

recognized that the Soviet Union's public display of technological superiority demanded massive

investment in higher education to ensure American competitiveness and pushed Congress and the Eisenhower Administration to make that investment (Mitchell, 2021). The resulting law, the National Defense Education Act of 1958, whose name reinforced the concept of higher education as a state necessity, provided over a billion dollars over four years to support science instruction and curricula and provided financial assistance to thousands of college students through a key provision of the law, the National Defense Student Loan program. This provision, the result of a compromise with deficit hawks in Congress that established the first federally funded student loan program in the United States, implicitly codified the federal government's position on higher education funding, even in the face of its recognition of higher education's importance for the state's scientific, technological, and economic power: The responsibility for the cost of college rests primarily on the student rather than the state.

This position was helped along by the influential conservative economist Milton Friedman, who argued that "students should be treated like companies," with lenders investing in students who would then repay them with future earnings (Friedman, 1955). Similarly, the chairman of an Eisenhower-commissioned panel on higher education suggested that loans, rather than grants or free tuition, "would promote independence and responsibility among students" (Mitchell, 2021, p. 19). The financing of higher education becomes a powerful pedagogical tool both at the state and the individual level to instill financial literacy, fiscal responsibility, and social and economic ideology.

As the 1960s advanced and growing numbers of students enrolled in colleges and universities as a result of the post-war baby boom, higher education increasingly came to be seen as an engine driving social and economic equality. To further support this movement toward

equality and social mobility, the Higher Education Act of 1965 dramatically increased the amount of federal money given to universities, created new scholarships, and provided low-interest loans for students to improve access to post-secondary education. College, it was increasingly understood, was the means to a better life, and the investment one made in it was practically guaranteed to pay off (Mettler, 2014). This, then, was the context in which student loans became an increasingly prominent and eventually overshadowing feature in the U.S. higher education landscape. An often well-intentioned set of goals to increase access to higher education and to reduce social and economic inequality became increasingly redirected by neoliberal state policy toward the privatization of cost and debt for students and their families and the socialization of risk for the banks and corporations that serviced these loans (Mitchell, 2019; Mitchell, 2021). These institutions grew exponentially more wealthy and powerful, with lobbying teams and political influence to match, in response to the explosion of college enrollments through the 1970s and 1980s, reaching more and more middle-class and lower-middle-class students, as well as the expansion of the for-profit college industry in the 1990s and 2000s and its particular emphasis on economically disadvantaged and therefore loan-dependent students.

The reasons for the precipitous growth of both student loan debt and the cost of higher education in the United States are complex, varied, and inevitably intertwined. In one prominent analysis, Hacker & Dreifus (2010) suggest a combination of administrative bloat (itself a response to the dramatically increased institutional bureaucracy of regulation and accreditation due the legitimation crisis of higher education's authority discussed earlier), reduced full-time faculty teaching loads as institutions pursue prestige (and its commodification through the

attraction of high-paying students) through research (and its monetization), and an "arms race" to enhance student amenities to attract students in an increasingly competitive market and a declining pool of potential enrollments. In contrast, Archibald & Feldman (2010) argue that higher education's increased cost is largely due to external market factors beyond its control. Their analysis employs Baumol & Bowen's (1968) theory of "service industry cost disease" – that is, in highly skilled service industries such as the performing arts and higher education, increases in productivity cannot keep pace with that of other sectors (there's only so much practice a top-tier violinist can put in, at which their level of advancement tapers off increasingly close to zero compared to previous violinists, just as there's only so much research even a highly productive professor can produce, and only so much improvement they can make in teaching), so, in order to keep attracting talent and avoid losing out to other industries where rising productivity drives wage increases, those industries must offer competitive wages despite little to no improvement in productivity. Martin (2011) argues, however, that this analysis would suggest that faculty wages have kept pace with the dramatic increases in college costs, whereas actual average annual increases in full-time faculty wages remained well below 1 percent from 1970 through the 2000s. Additionally, colleges and universities increasingly turned to cheaper adjunct and non-tenure-track labor during that time, resulting in an overall decline in faculty costs. Martin (2009, 2011) argues instead that increases in college costs are driven almost entirely by internal misalignment between administrative incentives (e.g., increasing enrollment by attracting students with successful and popular sports teams or state-of-the-art athletic facilities and student housing) and quality-driven cost efficiencies (those things are expensive and do not help make costs more competitive for students).

Martin's analysis is supported by Gordon & Hedlund's (2016, 2020) finding that, as

competition for students began to increase in the 1980s, colleges – particularly selective private

schools – chose to compete based not on price but prestige.[7] This drive for prestige was further

enhanced by the inaugural publication in 1983 of *U.S. News & World Report*'s annual college

rankings, its methodology relying almost entirely on surveys of select college presidents'

opinions – which inevitably sought to reinforce a particular concept of quality organized

principally around selectivity, which led to higher rankings, which led to a higher sense of

prestige, which led to more students applying, which led to a lower acceptance rate, which

further led to increased prestige, which led to more revenue as students and their families paid

top dollar for degrees from prestigious schools (Gordon & Hedlund, 2016; Gordon & Hedlund,

2020; Mitchell, 2021; Akers & Chingos, 2017). When Congress approved the Higher Education

Act, it provided colleges with the ability to raise their prices – as Gordon & Hedlund (2020)

note, each student essentially has a voucher to pay for college. This then became a new way for

schools to make money and created a perverse incentive for them to raise costs. In one infamous

case that characterized the era that followed, George Washington University, facing a potential

budget crisis, chose not to cut costs but to increase tuition dramatically, eventually making it the

most expensive college in the U.S., and consequently saw applications increase from 6,000 to

over 20,000 per year. As the university's then-president, Stephen Joel Trachtenberg, explained,

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[7] Gordon & Hedlund (2020) find that, between 1987 and 2010, increases were responsible for more than 54% of all tuition price rises during that period. Before 1993, the federal government only provided subsidized loans, which were given to students who demonstrated financial need; in 1993, the federal government expanded the loan program so that students who did not qualify for need-based subsidized loans could take out unsubsidized loans. These loans then significantly increased students' ability to pay for school, which in turn led to tuition increases both to increase the image of "prestige" and to cover demand-side attractors to draw students, such as high-profile sports teams, athletic facilities, and improved housing and student unions. The drive toward increased tuition in order to replace the decline of state financial support also led to the increased effort to attract international students who can afford to pay full, and higher, tuition (see e.g. Torres, 2015).

"You can get a Timex or a Casio for $65 or you can get a Rolex or a Patek Philippe for $10,000. It's the same thing. . . . It serves as a trophy, a symbol. It's a sort of token of who they think they are" (Luzer, 2010). As a result of the university's now-flush endowment through the artificial elevation of its prestige, Trachtenberg himself was earning $3.7 million per year by the end of his tenure as president, indicating the administrative incentives of focusing on competition based on prestige rather than price (de Vise, 2009).

Prestige, then, plays a powerful self-governing and self-policing role in college choice and in many students' decisions to aim for a "name-brand" school rather than less expensive options such as regional colleges and universities and, even more so, community colleges. It serves as a form of social and cultural reproduction for both institutions and individuals, shaping and reflecting their identity through an intangible aggregate of symbols and signifiers that represent one's value. The degree to which students have internalized the social construct of institutional prestige, which is then firmly reinforced socially and economically by decisions in hiring, tenure, and graduate and professional school admissions that can have dramatic effects on one's career trajectory and earning potential, serves as a rationalization to justify the resulting debt largely due to outsize tuition increases over the past four decades that themselves stem from prestige competition. The internalization and individualization of this prestige competition in turn also contributes significantly to the decision to enroll in college in the first place, a decision that has increasingly become economically questionable due to a rising debt-to-earnings ratio among college graduates:

Among Americans born in the 1980s – the millennial generation – college graduates are only modestly wealthier than those who never went to college. While they earn far more

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than nongraduates, they have failed to build the savings that prior generations of graduates did, in no small part because their debt has consumed so much of their earnings. (Mitchell, 2021, p. 6)

One additional final contributor to the precipitous rise in U.S. student loan debt over the past four decades is the implementation of income-driven repayment plans. Initially proposed to provide greater access to higher education for underprivileged students by anchoring monthly payments to income, and thus lowering the amount of monthly payments, structuring the loan over a longer repayment period, and making education seemingly more affordable, in practice this policy has led to significantly higher ratios of interest to principal paid. Students enrolled in income-driven repayment plans frequently end up paying primarily toward interest in these reduced but extended monthly payments while making little headway on their principal balance, sometimes leading to total payments more than doubling the initial principal (Hunt, 2018; Fossey & Cloud, 2017). Many economists still advocate for the policy for its putative increase in educational access, however, such as Nikalexi & Yannelis (2019) from the Manhattan Institute, a neoliberal policy think tank.

Accordingly, the policy decisions surrounding the financing of higher education that the United States made from the mid-twentieth century through the early twenty-first century – as well as the decisions it has chosen not to make, given that there are now 24 countries that offer fully state-funded post-secondary education (World Population Review, 2021) – reflect a complex and evolving ideological movement increasingly away from public funding and toward privatization that applied capitalist principles and practices that gradually eroded the concept of higher education as a public good. One of the most striking aspects of this process is the

emergence and eventual dominance of the notion, championed by Friedman and Reagan among others, that student loans and debt play an important pedagogical role – that they provide an embodied lesson in themselves about responsibility, incentives, and rewards, even as they externalize the costs of higher education to individual students and families despite still frequently representing higher education as an obligation toward intellectual development, civic engagement, social advancement, and economic productivity, and therefore a largely collectivized good. The internalization of this "common sense" understanding of student loans through cultural reproduction since Friedman is illustrated by contemporary opposition to proposals for student debt relief, often justified by responses such as "I pay my debts – why can't they pay theirs?" and concern for the moral hazard of disincentivizing good economic behavior.[8] These responses largely ignore the structural and systemic processes and inequalities that created this unprecedented debt in the first place, as partly detailed above, as well as the careful manufacturing of "common sense" and its attendant lessons about economic activity and financial responsibility that those processes through the educational role of the state as well as the influential organic intellectuals who speak on behalf of its interests.

Although almost certainly not planned, the convoluted loan system that has resulted from the complex, decades-long process of corporate lobbying and the ideological swings of political interventions from both Republican and Democratic administrations has also structured and disciplined the labor force that has emerged from it:

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[8] There are some legitimate reasons to oppose student debt relief, however, such as the observation that, unless administered with careful and likely legally precarious precision, it would disproportionately benefit wealthier students and thus further inequality (Cooper, 2020).

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Student debt has shaped how Americans live, work, and form relationships, research

shows. The homeownership rate among young Americans fell to the lowest level in

decades just as America's student debt tab soared in the 2000s and 2010s. Student debt

was one big reason why. Couples are delaying marriage because of their high student

loan bills. They are holding off on starting businesses. They are delaying saving for

retirement. They are choosing jobs solely for higher salaries, rather than jobs that best

suit their talents and interests, so they can pay off their debt. (Mitchell, 2021, p. 6)

Again, however, the situation is not as dire as it may appear, even in light of the

enormous debt that students and graduates continue to accrue. Social movements have grown in

recent years to advance support for legislation making state college tuition free and canceling

debt, advocated most notably by the prominent members of the Congressional Progressive

Caucus of the U.S. House of Representatives. As a result of this social mobilization and public

advocacy, public support for free tuition and cancelation of debt is now in the majority – a Pew

Research Center poll from 2021 found that "among all U.S. adults, 63 percent favor making

tuition at public colleges free, including 34 percent who *strongly* favor the proposal" (Hartig,

2021). These shifting public attitudes indicate the potential power of dialogue, discussion, and

advocacy for social justice and suggest the potential of political transformation of the cost and

debt structure of higher education in the near future. Equally important, with that restructuring of

the financial impact of college comes the potential for a re-evaluation of its meaning and

purpose; when one is released from the shackles of debt and the need to find jobs that can

adequately pay it down, the urgency of "being well off financially" may seem less extreme than

"helping others who are in difficulty" and even "developing a meaningful philosophy of life."

This section has sought to provide a brief analysis of the social, political, and economic framework that has structured educational opportunity and access in the United States over the past 75 years, as a case study in the principal role that the state plays through direct intervention and laissez-faire economic policy in educating citizens in both the narrow sense, through the nature and scope of schooling in higher education that it regulates, funds, and incentivizes; and the broad sense, through the ways that it has implicitly transmitted and produced beliefs about the value of higher education and its purpose and place within society as well as its position as a vehicle for social and economic mobility. It has also suggested that, while not always planned, crises, whether externally or internally caused, present opportunities for democratic states to maintain, reorder, or reassert control not so much through force but through the structuring of economic opportunities that govern the decisions that citizens make and through the cultural reproduction of ideological frameworks that govern their perception of "common sense."

Consequently, this section has also sought to provide an illustrative example of what the political sociology of education offers as an interdisciplinary theoretical lens to make sense of the pedagogical relationship between states and citizens. As Torres frequently observes, however, critical analysis alone is insufficient; this is how he escapes the charge of "zombie intellectualism" that frequently plagues critical pedagogy (Ford, 2017). As discussed in Chapter 4, Torres (1995, with Morrow) rescues theories of social and cultural reproduction from the intellectual trash heap that the critical sociology of education had longe tossed them into, recognizing that many aspects of social and cultural reproduction are beneficial and stabilizing for people and supportive in their struggle for individual and group recognition. Reproduction works bottom-up as well as top-down and offers an important mechanism for the struggle for

political, social, and economic equality and justice as well. It is through the process of cultural

reproduction coming out of critical theories that emerged in the 1960s and 1970s that widespread

critical awareness became possible of the power relations that have structured and limited social

and economic mobility through the state's control of the financing of higher education, partnered

with an increasingly neoliberal economic agenda that influenced its policies and practices. The

pressure placed by progressive groups, intellectuals, academics, politicians, and student activists

on the Biden Administration to offer some degree of debt forgiveness – and the fact that the

proposal is taken seriously within the national political dialogue, indicating a dramatic shift in

the Overton window of acceptable public discourse on the issue, is the direct result of the

reproduction and adaptation of those critical theories and perspectives applied to current pressing

issues within education.

One risk is that this critical attention remains focused on a symptom rather than the root

cause, however – debt forgiveness alone would erase the results of past inequalities but do

nothing to avoid the accrual of future debt that would merely end up reproducing those same

inequalities. This is why, similar to Torres' argument for a progressive model of global

citizenship education that emerges in response to the ongoing struggle between the state and

globalization, with a renewed concept of global citizenship replacing outdated models of

state-sponsored and state-governed citizenship that are insufficient to address the complexities of

contemporary social and environmental problems, the twin crises created by mounting student

loan debt and the Covid-19 pandemic also present opportunities for the emergence and

reproduction of social justice, rather than merely the perpetuation and re-entrenchment of

injustice and inequality.

Some significant progressive responses to the pandemic have already emerged. Green, Mynhier, Banfill, Edwards, Kim, & Desjardins (2021), for example, argue that the ruptures and disruptions caused by the pandemic create new opportunities for a more cooperative, inclusive, and flexible framework for education that draw on feminist epistemologies. Astra Taylor. And, most broadly, Torres' (2019b) own model for a global citizenship education presents a vital response to the most pressing crisis of all – environmental catastrophe due to global climate change – and, as a result, both answers one of the primary critiques of Freirean critical pedagogy for its lack of engagement with environmental concerns (Bowers, 1993) and provides the "missing chapter of *Pedagogy of the Oppressed"* by articulating and expanding on a model of critical ecopedagogy (Misiaszek & Torres, 1999).

Chapter 6: Conclusion

The preceding study has offered an analysis of the emergence, development, and significance of the subfield of the political sociology of education through the lens of its preeminent theorist, Carlos Alberto Torres, as shaped by both his work in the field and the lived experiences that influenced his perspective on it. This conclusion in turn provides a brief summary of the answers to the four research questions that frame the study along with implications for further study.

The first research question asks: How have the historical events that Torres has lived through, and his personal experience of exile, shaped the development of his thought in the political sociology of education and his understanding of the concepts of democracy, citizenship, multiculturalism, and globalization? In brief, Torres' experience growing up in Argentina under both under the populist regime of Juan Perón and two separate right-wing military dictatorships, the second threatening the lives and safety of Torres and his colleagues, instilled a sense of the fragility and contingency of democratic institutions and practices. The norms and values that undergird and inform democracy turn out to be much more tenuous than those who have grown up in stable democracies might assume. While in Torres' native Argentina, the state engaged in a Gramscian war of maneuver to use violence and repression to ensure obedience, in his later-adopted home of the United States, the state and its capitalist benefactors engaged in a war of position to influence the common sense of its citizens to serve its political and economic interests, and this latter war has required a much more systemic analysis to assess its root causes and effects.

This analysis argues that the twin forces of neoliberalism and globalization, often working in tandem, have contributed to the gradual erosion of democracy and national sovereignty. Given the resulting constraints on the neoliberal state, the dialogue initiated by social movements within democracies has been crucial for the advancement of multiculturalism, itself a necessary component of healthy democracies to enable dialogue between opposing perspectives and to contribute to the continuous revitalization of culture. Social movements, partly a product of multiculturalism, are necessary for democracy to operate and necessary for the state to continue to revise itself in ways that are consistent with the social contract. Within such environments, public discourse becomes the means through which many social, political, economic, and cultural decisions are made, and this emphasis on the public sphere as the means of democratic dialogue provides necessary checks on the abuse of power and on overreach toward either end of the political spectrum. Neoliberalism and globalization have limited this power of the public sphere, however, and their effects have resulted in a series of political, economic, and environmental crises that demonstrate the need to expand our sense of citizenship to the global sphere in order to effectively address these crises.

The second research question asks: How has Torres's experience living in both Argentina and the United States during particularly fraught and complex political and economic times shaped his understanding of the construction of the individual in relation to the state, as well as to education, democracy, and citizenship? As noted above, Torres' experience growing up and living in Argentina during an era of political, economic, and social instability and, later, state-sponsored violence and terror made clear the fragility and tenuousness of democracy and of the institutions, norms, and practices that maintain it. His later experience with and in the United

States demonstrated the role that capital plays in using the state as an instrument of both violence and coercion to reinforce and reproduce its interests.

Collectively, these experiences indicate the need for the cultivation of critical consciousness, in the Freirean sense, to identify the ways that political and social environments can shape one's common sense and construct the individual as an unwitting agent to perpetuate those interests. Education includes more than just formal schooling, but encompasses the full range of social and cultural reproduction as well – the state, in effect, is the most powerful and influential pedagogical institution, largely determining the norms, values, and information that are important and that should be passed on and instilled in citizens. Despite the failures of neoliberal economic policy, the neoliberal state has largely expanded in the late twentieth and twenty-first centuries due to the close alignment between capital and the political figures and institutions that establish policies that support and protect its interests. As a result, the potential for effective democratic discourse has been curtailed through a combination of rising populism and authoritarianism as well as social media platforms that have almost entirely taken the place of the public sphere and have increased polarization through filter bubbles and echo chambers that intensify anger and thus increase engagement. For Torres, these developments reveal the need for a reformulated concept of global citizenship, one that operates outside of the waning power of national sovereignty, to address the political, economic, and environmental crises that humanity is increasingly facing.

The third research question that has framed this study asks: What is the influence on Torres' work in the political sociology of education from earlier theoretical models from sociology, political theory, economic theory, and philosophy, and how did Torres' work develop

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in relation to and in response to those models? This question is addressed in Chapter 3, but, in brief, the sociology of education has long focused on how education and schooling can either reproduce or resist the reproduction of inequality in society, while political sociology asks similar questions to understand how power, inequality, and oppression operate within society. Torres connects these two traditions to understand education as both an agent for the reproduction of power as well as a site of struggle for conflicting visions toward the possibility of equality and social justice. As noted above, the state is the most powerful and influential pedagogical institution for Torres, conveying through force, coercion, and persuasion the core concepts of citizenship, identity, social and economic relations, who is and should be at the center and who is and should be on the margins, and who should and should not rightly wield power. The pedagogical role of the state becomes a principal point of inquiry for Torres' work, as well as the political and economic theories and practices that limit or replace state power and similarly shape the "common sense" of citizens to determine and reproduce those concepts identified above. While formal schooling itself is largely governed by the state and thus offers limited potential for the expansion of democracy and equality separate from what the state itself determines, social movements create the possibility of resistance to inequality and injustice that can at times be adopted within educational institutions to offer sites of struggle toward the expanded potential of democracy.

The fourth research question asks: What is the relationship between the literal and figurative stances of exile and of cultural, economic, and political imperialism in shaping concepts and practices of education and of the development of citizenship and democracy in Torres' work? This question is addressed in Chapters 2, 3, and 4, which collectively argue that

the position of exile places one perpetually in the stance of an outsider, neither fully in one place or another, and forces an internal Hegelian dialectic that attempts to synthesize one's understanding of the relationship between self and other, between oppressor and oppressed (which, in the Memmian and Freirean sense, are simultaneously contained within oneself), and between permanence and change. When one is neither in one place or another but always perpetually in between, always caught between a sense of home and a sense of alienation, one is often driven toward sympathy for practices that further the organic development of community to fill the sense of loss and longing that exile inevitably creates. This process also underscores the importance of dialogue, collaboration, and connections, which are all core concepts and practices within Torres' work and life.

The fifth and final research question asks: What is the relevance and applicability of Torres' work within the political sociology of education to help make sense of contemporary issues within education? This question is addressed in Chapter 5, which examines two current pressing problems within higher education: the mounting student loan debt crisis within the United States and the ongoing revaluation of higher education itself, wherein students and parents are becoming increasingly uncertain about the return on investment of more and more expensive college education. An analysis of the student loan debt crisis reveals the often hidden but crucial role that the federal government has played throughout the past eight decades in contributing to this crisis, underscoring Torres' argument of the importance of policy as an educative process that shapes the political and social context in which citizens make decisions. Student loans, it was determined long ago by policymakers in the moments that eventually gave

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rise to this crisis, would better teach college students the importance of investment in their education, rather than grants or free college tuition.

Yet the often crippling debt that those decisions resulted in has led to another unexpected development, but one not altogether unwelcome to the neoliberal state: The increased questioning of the value of higher education, which is now largely defined in terms of return on investment as a mostly economic activity. With the role of the university diminished to help shape the critical consciousness that can challenge neoliberal orthodoxy, other forces of social and cultural reproduction, including mass media outlets and social media platforms owned by the planet's wealthiest corporations, take on an increasingly prominent role as pedagogical agents in contemporary society. One recent social movement, however, indicates a potential challenge to the perspectives illustrated in these two problems: Calls for student loan debt forgiveness and free college suggest a potential shift in citizens' attitudes toward the value of higher education, and a majority of Americans now support making tuition at public colleges free – indicating their recognition of higher education as an increasingly necessary public good.

Collectively, the answers to these five questions indicate the vitality of the work of the political sociology of education as a theoretical framework and research agenda that enables both a critical analysis of historical and current conditions within education and as a means of identifying the potential to better address the problems that have emerged from those conditions. One significant limitation of this study, and of some of the work both within Torres' writings and within the political sociology of education more broadly, is the treatment of key concepts and categories such as education, neoliberalism, capitalism, democracy, civil society, and the state as monolithic when they are inevitably diverse and distinct in different environments; neoliberalism

as an applied practice, for example, takes on different characteristics within a Brazilian context than it does within an American context, and both are different from its application within a German context. Further research can help to illuminate these important differences and articulate the ways that different democratic systems interact with these forces to demonstrate the complex varieties of democracy, capitalism, and the state, among other concepts.

Similarly, social movements have different effects within different countries, indicating that civil society is a function of how the state operates and thus can reveal how the interactions between social movements, civil society, and the state play out in different ways. Further research is into specific countries and regions then also warranted to demonstrate and analyze the different ways that social movements play out through these interactions as a result of the varying power dynamics and relationships between each.

Education is equally as diverse and complicated, both from the perspective of comparative education, as educational systems and their role, purpose, and function vary to small or large degrees within different states, as well as from within the disciplinarity of higher education itself, as different disciplines and fields have different roles within and relationships with power, the state, and civil society. As the neoliberal university invests in and expands the presence of STEM fields in response to both consumer demand and their return on investment, for example, the relationship between different sectors of higher education also merits further analysis. Given that Torres' work within the political sociology of education offers a systematic theoretical analysis of the dynamics of power and the way it shapes perspectives and behavior in contributing toward either equality or inequality, additional research on the comparative power dynamics within higher education would be valuable.

An additional area that deserves further attention is the complex and continually evolving relationship between neoliberalism, globalization, and national sovereignty. While this study often argues that national sovereignty has declined due to the advancements of neoliberal economic policies and certain aspects of globalization, recent developments suggest that the picture is more complicated and that national sovereignty remains a vital force in certain circumstances, for example within the Trump Administration and "The Chinese Initiative," a U.S. policy established to counter economic espionage by China that some have indicated is a major step in a New Cold War between sovereign nations (Sessions, 2018; Zhao, 2019). Accordingly, further study into the complex and diverse relationships between national sovereignty, renationalization, and the operations and effects of neoliberalism and globalization is warranted.

Finally, a study of the relationship between biography and theory would be remiss without a self-reflection on that relationship in one's own intellectual development. I first read Torres' work, and then Freire's work, in the late 1990s; I had been teaching college courses for a few years by that point, on literature and cultural studies, but deep down I was troubled by an underlying reality: I was teaching elite culture to mostly elite college students, in effect reproducing cultural capital for those elites to comfortably maintain and advance their status; as someone who had used the educational system to climb out of poverty himself, this reality sat uneasy with me. Like Torres, I came from a working-class background and was the first member of my family to graduate from college; Lubrano (2005) writes movingly about the tensions, sacrifices, and silences that are often forced when children of blue-collar backgrounds enter into white-collar environments and, like Freire, of the divided consciousness and split allegiances that

emerge, making it difficult for those two sides of the self to connect and to see how one's own knowledge can be devalued and repressed in the effort to pass. I experienced that process myself: I enjoyed talking about literature and ideas with my students, and enjoyed introducing them to works I cared about and to the reasons why I felt they mattered, but something in me whispered that I'd mistaken the means for the end in terms of how education was actually being used in people's lives.

It was Torres' work that helped me find a pathway out of that problem – not by solving it, since, as both Freire and Torres point out, any really important problem you have to solve yourself, but as a guide on the perpetual journey toward exploring and understanding the complex and continually evolving relationship between power and education, and toward remembering that power can work bottom-up as well as top-down. A second lesson – sometimes a difficult one for poor and working-class students to remember – is the need to acknowledge and value one's biography rather than hide it. A third lesson is the recognition of education as a means of questioning and critiquing power dynamics rather than perpetuating and reproducing them. And a fourth and perhaps most important lesson is on the fragility of democracy and of its institutions and processes, which themselves make possible the environment for emancipatory education, and the need to remain vigilant in its support and defense. Given the current attack on democracy in the United States under the ironic guise of freedom, the continual need to protect and fight for democracy becomes increasingly urgent.

A lot has changed in the past 20-plus years in the relationship between culture and power since I first read Torres and Freire while teaching literature to relatively elite and privileged college students – for starters, a deep knowledge of literature, its stock as cultural capital already

considerably diminished by the 1990s, is approaching irrelevance in the age of social media. Freirean ideas, once considered dangerous, have been rebranded (and sanitized for your protection) and are now flourishing across schools and universities in concepts like the flipped classroom and learner-centered education, although often without the vital dialogical component to make the encounter authentically a move toward critical consciousness and liberation. And, most of all, democracy and scientific knowledge are now under full assault both in the U.S. and abroad. Political polarization in the United States has reached historic levels, not only in the form of competing ideologies but, increasingly, competing perceived realities, with broadcast and social media platforms creating filter bubbles that reflect, reinforce, and consequently intensify beliefs and enable the viral spread of misinformation (Hong & Kim, 2016; Pennycook, Cannon, & Rand, 2018; Bail et al., 2018). Collectively, these developments have created a crisis of citizenship, including increased disregard for democratic rules and norms, which in turn has created a crisis of democracy and of constitutional patriotism, which centers on "the norms, the values and, more indirectly, the procedures of a liberal democratic constitution" (Müller, 2007).

For Torres, these circumstances call for a revitalized civics education project to help rebuild this sense of constitutional patriotism in the digital age, one that restores the spirit of dialogism and popular education among adults as well as students to engage in genuine and earnest discussions about civics, separate from the state curriculum requirements and the need for credentialing and professional or financial advancement. The civil sphere, vital for the survival and advancement of constitutional democracy, is under attack on several fronts in the United States, including the filter bubble of social media, the viral spread of misinformation, the rise of economic inequality, declining trust in public institutions and science, and the growing

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sense among some that government is increasingly disengaged with the concerns and interests of its citizens. The January 6 assault on the U.S. Capitol Building, the decline in trust in public institutions (Rainie & Perrin, 2019) and in science and scientific reasoning (Nichols, 2017), the destabilization of social and economic relations due to the COVID-19 pandemic, and the rapid proliferation of misinformation in recent years collectively demonstrate the clear need for a revitalized sense of citizenship and of the norms, values, and processes of constitutional democracy in the United States. This process starts with education, and such a project as Torres envisions would provide several channels for applied, active learning at different ages to model, embody, and practice those norms, values, and processes.

Civics education has traditionally focused on the teaching of constitutional democracy and affiliation with the nation-state. Three categories are linked to civics education:

- *Civic knowledge*, which in the context of constitutional democracy entails the knowledge of basic concepts informing the practice of democracy such as public elections, majority rule, citizenship rights and obligations, constitutional separation of power, and the placement of democracy in a market economy that is used as the basic premises of civil society;

- *Civic skills*, which usually mean the intellectual and participatory skills that facilitate citizenship's judgment and actions; and

- *Civic virtues*, usually defined around liberal principles such as self-discipline, compassion, civility, tolerance and respect.

A revitalized civics education project would restore each of these categories in the (mis)information age with activities that revitalize the contemporary practice of citizenship

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through knowledge of the fundamental concepts and practices that inform constitutional democracy, cultivation of the skills that enable its protection and maintenance, and respect for and commitment to the values and virtues that ensure its survival. Although ambitious, such a project would provide several points of intervention to enable citizens to learn and practice the processes of informed democracy, including:

- Interactive curriculum designed to train students to think critically about social media and digital environments, replicating the scientific process in their critical examination of sources and arguments;

- The use of game-based activities to help support self-directed and motivated participation of students in exploring civics issues from multiple perspectives and thus enhance their sense of empathy and understanding through interactive and/or story-based games (Ryan, R., Rigby, C., and Przybylski, A., 2006);

- Summer institutes that train educators on effective pedagogical praxis in democratic education and train students on the process of deliberative democracy, focusing on policy discussion and development and its impact on diverse constituencies; and

- Inclusion of students in the decision-making process for the governance of their own educational environments.

A similar project, the Project for Enhanced & Active Citizenship Engagement (PEACE), is overseen by Daniel Schugurensky, one of Torres' former students and now a professor in the School of Public Affairs at Arizona State University, and has been ongoing since 2013, enabling critical participation by students in the school budgeting process and thus allowing access to the construction and deliberation of their educational environments. As a pedagogical tool, students

learn democracy by doing; they learn to deliberate, listen to each other, collaborate, find solutions together, and promote the common good. As a tool for civic engagement, both the Arizona project and Torres' concept of a broader civics education project help reduce the civic engagement gap, give students a voice, and nurture new generations of political actors willing to exercise their agency to improve society through electoral participation but also through involvement in volunteering activities and in social movements striving for environmental and social justice. In the PEACE project, at the end of each school participatory budgeting cycle, students vote using the same voting equipment that is utilized in local, state, and federal elections, which helps to demystify the electoral procedure. Moreover, after they cast their vote in the school participatory budgeting, eligible students are provided the opportunity to register to vote in future elections. In the last few years, thousands of students have registered to vote through this process, supporting record voter turnout of Arizona youth, especially Latinx youth, in the 2020 elections.

Such projects, although small, allow for the possibility of hope for the restoration and defense of democracy, the civil sphere, and the institutions and processes that maintain them. The threats to democracy and to the environment remain significant, however, so, in the face of these developments, the work of Torres remains vital in turn toward working out the nature of and complex relationships between power, knowledge, education, democracy, citizenship, and freedom as we collectively shape our future, for worse or for better.

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