Education and the production of inequalities across the Global South and North

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Abstract
Education is an essential aspect of any society in the world. As such, it has been a topic studied by many sociologists since the origins of the discipline. Today it is one of the most common subjects in sociology, in part because it has been recognised as a crucial environment for the (re)production of inequalities. This article explores the role of education in the (re)production of social inequalities and its potential to challenge such inequalities. In addition, the article presents some of the distinctions between research in the Global South and North, both in geographical and metaphorical terms. Since this article is the introduction to the special issue Education and the Production of Inequalities: Perspectives from the Global South and North.

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Inequalities: Dialogues from the Global South and North, a synopsis of the published articles is presented at the end.

Keywords
cross-cultural dialogue, education, Global North, Global South, inequalities

This article is the introduction to the special issue Education and the Production of Inequalities: Dialogues from the Global South and North. Accordingly, it aims to critically explore what the role of education is in the (re)production of social inequalities and its potential to challenge such inequalities. These persistent yet unanswered questions have been of crucial relevance in the Global South and North (Gandin & Apple, 2013), and have been explored by authors such as Paulo Freire, Pierre Bourdieu, Boaventura de Sousa Santos, and Diane Reay.

Acknowledging criticism as to the lower visibility of sociological studies from the Global South compared to those from the Global North, this special edition aims to serve as a forum for cross-cultural consideration of how education affects contemporary social issues. We attempt to challenge the body metaphor commonly used to explain the colonial relationship, stating that ‘the head that thinks is in the north, while the body that acts (and that exercises the biological-corporal functions) is in the south’ (Walsh, 2005, p. 42). By assembling high-quality empirical studies conducted in a broad spectrum of contexts, we seek to highlight commonalities and differences in the mechanisms through which education works against (or in favour of) social justice, producing exclusions and inclusions of subjects by – for example – their gender, social class, race, ethnicity, age, nationality and disability status.

The authors assembled in this special issue reflect upon their research and identify points of encounter to different contexts, based on a diversity of sociological theories and methodologies. The special edition concentrates the interests of scholars and academics working in the fields of education and social inequalities in a broader sense. We think that this publication will benefit sociology students and researchers, as well as practitioners and policy makers, engaging in understanding education as a mechanism to produce and transform social inequalities. We also expect that this special edition will benefit those interested in strengthening the dialogue between studies across the Global South and Global North.

This introductory article will be divided into four sections: first, an overview of the field of the sociology of education; second, a brief analysis of the literature on the relationships between education and the (re)production/transformation of social inequalities; third, a cross-cultural exploration of this topic across the Global South and North; and finally a presentation of the articles comprising the special issue.

The sociology of education

Education has been a topic in sociology since the discipline began. As one of the founder authors stated, ‘each society, considered at a given stage of development, has a system of education which exercises an irresistible influence on individuals’ (Durkheim, 1956, p. 66). This means that education is an important area of societal life; therefore, its study has raised theoretical and methodological questions in the sociological field. In
this sense, education has been a field of study utilising different methodological approaches by both quantitative and qualitative sociologists. It has also been the subject of analysis via diverse theoretical lenses: functionalist, structuralist, poststructuralist, postmodernist, postcolonial, decolonial, indigeneity, feminist, and so on.

In this scenario, education has become a crucial area of sociological enquiry. In the origins of sociology, Durkheim (1956) claims that societies set up a certain *ideal of men* and that they need some *degree of homogeneity* to survive. Thus, the role of education is to reinforce both and to ensure their continuity from one generation to the other. This functional explanation of the relationship between education and society, where the process of homogenisation is defined as neutral and objective, was criticised during the 1970s and 1980s as it obscures the fact that education has also legitimised and reproduced social domination by teaching, in the case of schools, according to the distribution of power in society (Bowles & Gintis, 1976). New layers of criticism of this functional explanation have been added, for example, by feminist scholars (Bhopal, 2020; Gonick, 2003) when analysing the *ideal men* as representing a patriarchal society perpetuated by the education system, in addition to the absence of the intersecting dimensions of class and race. Moreover, decolonial thinkers (e.g. Walsh, 2007) have contended that the assumption behind the idea of homogeneity is an extension of the colonial legacy, which denies the multiple subjectivities that configure the educational experience and social world. These examples illustrate that education has constituted an essential sphere for the production of knowledge in the sociological field.

Education has also become an optical reflection of the social world, both of the exterior as a *window* – mentioned by Oyarzún et al. (2021, this special issue) – and also as a *mirror* reflecting many of the issues that are ongoing in the wider world. These two optical phenomena can be seen in this special issue where authors place education in dialogue with broader social phenomena such as neoliberalism (Oyarzún et al., 2021); citizenship and belonging (Vincent, 2021); social mobility (Chen, 2021); ableism (Peruzzo, 2021); social reproduction (Verhoeven et al., 2021); migration (Cortés Saavedra, 2021); socio-economic status (Catalán et al., 2021); and segregation (Carrasco et al., 2021). Furthermore, many of these social issues intersect with each other in the field of education.

Finally, the study of education from a sociological perspective acknowledges that it takes different forms, influencing diverse contexts that are essential to the configuration of society. The articles that comprise this special issue address these different forms, which highlight the complex and multidimensional role that education plays in society: education may take the form of an institution, but education is also about practices, strategies, discourses, hierarchies, relationships, power, identity, belonging and struggles. All these different shapes of education can be analysed through one of the major debates in the history of the sociology of education: the production and reproduction of inequalities.

**The production and reproduction of inequalities from/in education**

It is often stated that we live in a time where education has been democratised, therefore, access to knowledge and better opportunities are available for everyone. However, this
idea has become more a political slogan of governments’ national policies and international organisations than the reality. In other words, despite an increase in global literacy rates, inequalities persist, determined by a series of political, social, cultural and economic conditions. These persisting inequalities have been studied for a long time by sociologists of education all around the globe.

A crucial author who has studied the production of social inequality and its links with education is Pierre Bourdieu (e.g. Bourdieu, 1984; Bourdieu & Passeron, 1990). Bourdieu argues that cultural knowledge and educational credentials are assets in the class struggle for advantage and, as such, are a form of cultural capital that play a similar role to economic resources. In other words, the distribution of cultural capital in a society is as unequal as the distribution of economic capital. Thus, those who have more highly valued cultural capital will have more advantageous positions in society.

Bourdieu sees educational credentials as increasingly important in modern societies, since they have:

precipitated a shift in upper-class inheritance practices from one of direct transfer of property to reliance upon the cultural transmission of economic privilege: investment in education gives upper-class offspring the chance to appropriate family privilege and wealth through access to the more powerful and remunerative institutional positions. (Swartz, 1997, p. 181)

For Bourdieu, success in education is largely shaped by how an individual’s class background affects their ability to ‘play the game’ of education, in which educational systems are always skewed towards middle-class values and culture. However, what happens with people who do not have tools to ‘play the game’? The ‘rules of the game’ in a field (such as the field of education, or the field of professions), determine whether different capitals will be useful or valuable, and people’s ability to ‘play the game’ in a field will depend on their possession of economic, cultural and social capitals as well as whether their habitus is adjusted to the field. All of these factors will influence people’s ability to overcome inequalities. Education is considered an important factor in social mobility and the improvement of people’s life conditions. However, such assumptions have been heavily critiqued by class, race and disability scholars in sociology for ignoring the way in which class, race and ability advantages shape educational success and for providing justifications for inequality (Meekosha, 2011; Reay, 2017; Webb et al., 2018). Frequently, the increase in access to education does not translate into a reduction of relative inequalities (Reay, 2013). Although there has been an improvement in access to, for example, higher education, structural inequalities in terms of class, gender and ethnicity remain (Sepúlveda & Lizama, 2021).

One of the main discussions regarding education and the production and reproduction of inequalities is that institutions (i.e. schools, universities) and actors (i.e. teachers, students, parents) within educational systems are faced with an issue that has structural roots, making the likelihood of an individual overcoming the system an unrealistic undertaking (Vincent, 2021, this special issue). However, innovative scholarship (such as that represented by the articles in this issue) can illuminate the inequalities and pave the way for a societal solution. As one of Peruzzo’s (2021, this special issue) interviewees claims, ‘if
we don’t mobilise things, they’d remain as they are’. In the final section of the article, we discuss how the special issue authors expose and reflect on different dimensions of education as part of the production and reproduction of inequalities in different contexts and settings.

The cross-cultural effects on social issues: dialogues between Global South and North

Education is not exempt from cross-cultural effects and, as such, is shaped by discussions around the distinction between the Global South and North. According to Boaventura de Sousa Santos and Maria Paula Meneses (2014), there are two ways of understanding the ‘South’: metaphorically and geographically. The first meaning refers to places where the oppressed are subjected to colonial and capitalist domination. The second meaning indicates countries which are geographically positioned in the south of the globe, including Africa, Latin America and Asia. The authors propose an understanding of the epistemologies of the south by merging those two meanings. Following this argument, this special edition defines the Global South and the Global North as a confluence of both metaphorical and geographical meanings.

The distinction between North and South has been historically documented, as the conflict between the centres and the peripheries (Amin, 2019). The idea of epistemologies of the South is to recognise knowledges stemming from both as valid. In other words:

The epistemologies of the South are an invitation to a wide recognition of the knowledge experiences about the world that include, after its reconfiguration, the knowledge experiences from the Global North. This allows the construction of unexpected intercommunication bridges, new paths of dialogue. At the epistemological level and other levels, the world cannot be satisfied with brief compendiums of itself, even knowing that ‘the complete and integral version’ is impossible. Our energies must focus on valuing the diversity of knowledges, so the intentionality and intelligibility of social practices are as broad and democratic as possible. (Santos & Meneses, 2014, p. 16, our translation)

Acknowledging the equal validity of knowledges from the Global South also means that countries of the North can take the option of learning from them. Moreover, that process of learning should involve unlearning what it is already established as knowledge from the North (Santos, 2017). As Samir Amin said, ‘European reconstruction, then, requires the deconstruction of the current project’ (Amin, 2019, p. 817). Examples of how the literature of the South could assist this process are studies with indigenous populations in a diversity of territories (Land, 2015; Q’um Q’um Xiixem et al., 2019). However, there is still sociological research that studies the South from a North’s point of view. In particular, there is some evidence that educational research has played a role in perpetuating colonial knowledge through practices, people and locations (Patel, 2016) – for example, studies that refer to ‘developing education systems’, or where scholarly knowledge is highly valued above community knowledges. Both topics of educational research are built on hierarchies of power that resonate with the logic of colonial legacy, where institutions and social actors are placed as the ‘others’ that need to be civilised, either
through structures or knowledge. This special issue tries to counter that legacy by providing an intellectual space to make visible research being conducted in the Global South as well as to promote the dialogue between North and South.

**Education and the production of inequalities: dialogues from the Global South and North**

The purpose of this special issue of the *Journal of Sociology* is to bring together current scholarly research on the sociology of education to critically explore the question: what is the role of education in (re)producing social inequalities and what potential does it have to challenge them? We invited authors to reflect on their research and to identify points of encounter, in different contexts, based on a diversity of sociological theories and methodologies. Articles addressing education as a core dimension of social life and how policies such as the closure of schools worldwide impact current social inequality gaps were particularly welcomed.

Drawing on comparative studies, articles by Oyarzún and colleagues and by Verhoeven and colleagues skilfully reveal crucial mechanisms in the production of social inequalities through education, both in the Global South and in the Global North.

The article ‘Ethics in neoliberalism? Parental responsibility and education policy in Chile and Australia’, by Juan de Dios Oyarzún, Jessica Gerrard and Glenn C. Savage, makes a comparison between neoliberal school policies in Chile and Australia: the school choice and admission policy and the school devolution policy, respectively. They aim to understand the impacts of recent developments in the educational policy sphere on parents in terms of ethics, responsibilities and engagements towards policy and institutions, using a post-structural approach. They argue that neoliberal policies do not simply evoke individualised and instrumental forms of parental responsibility in schools but rather entail a more complex and ambivalent intertwining of ethical commitments. In Australia, a conjunction of civic participation and autonomy/privatisation; in Chile, a new understanding that partly leaves behind the competitive nature of the highly marketised educational system and demands a form of responsibility that exceeds individualistic rationality of self-benefit.

Marie Verhoeven, Hugues Draelants and Tomas Ilabaca are the authors of ‘The role of elite education in social reproduction in France, Belgium and Chile: Towards an analytical model’. This contribution aims to deepen the knowledge of elitist pathways and educational organisations as sociological objects, via a comparison of three countries. Empirically, they rely on recent data collected in Chile, and existing work in French-speaking Belgium and France. The authors highlight how elite institutions are essential for social reproduction as they allow the elites to access positions of power. The authors also emphasise the differences between the studied countries. For example, France is presented as a country that makes no secret of its intention to educate elites, while Belgium reveals a more diffuse pattern of elite selection and uneven effects in terms of social destination. Chile, in turn, best demonstrates the effects of market regulation on education, with their system perpetuating the educational advantages of economic elites, while at the same time exacerbating existing educational inequalities.
The articles by Vincent, Cortés Saavedra, and Carrasco and colleagues discuss the different ways through which exclusion and segregation around social class, race and nationality are produced in school settings.

In the article ‘Belonging in England today: Schools, race, class and policy’, Carol Vincent discusses the ‘felt experience of citizenship’ based on empirical data from two research studies. One explores the educational strategies of Black middle-class parents and the second analyses the teachers’ response to the recent requirement to promote government-identified national values (‘fundamental British values’) in the classroom. Vincent theorises the notions of belonging and citizenship as stressors of everyday and affective life, arguing that both reveal many different experiences of belonging in the UK. She argues that school settings should recognise different forms of belonging as a way to produce a sense of community beyond the dominant White middle-class culture.

Andrea Cortés Saavedra’s article, ‘Migrant children in a Chilean school: Habitus, discourses and otherness’, enquires into the discourses of ‘otherness’ being reproduced in Chilean schools about migrant students. Utilising a focused ethnographic method and an approach based on critical realism and Bourdieuian theory, Cortés Saavedra argues that there are surrounding discourses and pre-existing sets of social relations (state–school relations, colonial relations, intergenerational relations), which are transformed/reproduced, negotiated and challenged in the daily interactions within school. She concludes by warning that these narratives reproduce broader social and generational inequalities.

The article by Alejandro Carrasco, Manuela Mendoza and Carolina Flores, ‘Self-segregation strategies through school choice in Chile: A middle-class domain?’, explores the strategies of parents regarding school choice in the unrestricted, highly marketised educational system in Chile. Employing a Bourdieusian approach, by analysing quantitative data complemented with ethnographic information, the article highlights that parents enact both vertical (in relation to other social classes) and horizontal (in relation to other groups within the same social class) self-segregation strategies when choosing a school for their children. Based on this finding, the authors argue that school choice in Chile can be interpreted as a strong segregation mechanism based not only on socio-economic differences but also on sociocultural ones.

A third group of articles revolve around the topic of the production of social inequalities in higher education across different national contexts. ‘Clothing and identity: Chinese rural students’ embodied transformations in the urban university’, by Jiexiu Chen, focuses on rural students’ experiences of social mobility, symbolic violence and transforming strategies in the field of the urban university in China. Chen conducted semi-structured interviews with 50 Chinese rural students who graduated in different decades (1980s–2010s) and applied a life-story approach to analyse the data. Drawing on data from the last two cohorts (2000s, 2010s), she pays particular attention to bodily practices embedded in the students’ subjective social mobility experiences and illustrates how rural students strategically transform their ‘style’, as dispositions of habitus, in the urban field to obtain valued forms of embodied capital. Using a critical lens, Chen emphasises how rural students need to adapt to the dominant urban culture to work on their higher educational trajectory as a way to ‘walk out’ of their rural life.
'A call to rethink the Global North university: Mobilising disabled students’ experiences through the encounter of Critical Disability Studies and Epistemologies of the South’, by Francesca Peruzzo, contributes to the study of disability and inequalities in higher education by merging Foucault’s post-structural understanding of the subject and perspectives from the Global South on universities and from critical disability studies scholars in higher education. Drawing upon qualitative data collected during a doctoral study in a well-performing university in the north of Italy, she articulates students with disabilities’ accounts of thinking of disability as diversity. The author also emphasises the highly discriminatory practices of higher education institutions regarding students with disabilities by questioning ableist and colonial premises in Global North universities.

The article by Ximena Catalán, María Verónica Santelices and Catherine Horn, titled ‘The role of an equity policy in the reproduction of social inequalities: High School Ranking and university admissions in Chile’, quantitatively examines the High School Ranking – a socioeconomic-neutral equity policy implemented in 2013 in Chile for admission to the most selective universities in the country. To test the relationships involved in the policy design, the authors use a Structural Equation Model (SEM) with validated survey data collected in nine schools of different socioeconomic status and academic achievement level (N = 1,800). Despite this ranking policy, which aims to widen higher education participation for different socioeconomic groups, the authors’ results challenge the philosophy of socioeconomic neutrality behind it and conclude that students from advantageous backgrounds are still better positioned in the academic field as they can place themselves more strategically in that landscape.

Gathering researchers from different national contexts has allowed us to identify several meeting points that allow dialogue between findings and positionalities across the articles. For example, understanding that the different exclusions experienced by migrant children and adolescents in their school educational setting in northern Chile are not so different from the exclusions experienced by rural students in the context of urban universities in China makes visible that both configurations of the educational field still reproduce discourses of otherness. Or seeing how educational actors when facing an educational field that is still strongly neoliberal – whether in the context of Australia, Chile or Italy – are challenged to position themselves and mobilise in response to collective and public goals. These and many other intersections – and we strongly invite our readers to identify these meeting points – allow us to confirm the still growing need to generate spaces for dialogue and exchange between research conducted in the Global South and North. Spaces that allow us to think and reflect on the sociology of education as a discipline that is still trying to make visible the different expressions of inequalities that arise from the educational field, impacting those who live in the South and North.

We would like to end this introductory article with a brief reflection of the process that we have lived as editors of this issue. When the possibility of presenting a proposal for this special issue emerged, the four of us agreed that we wanted to address the question of how inequalities continue to be present in the education systems and how these could be challenged. We were clear that we did not want the special issue to reproduce the colonial logic that presents the cases of the Global North as those that the South should follow, but
rather wanted to be emphatic about the need for dialogue and exchange of experiences and knowledge. This clarity did not emerge from a vacuum, but from a personal search, which became collective, when we began to reflect on our own academic trajectories studying these issues as Chilean / Latin American / Indigenous women. These experiences led us to realise that exchange of knowledge was scarce and what was European, White and male dominated the field, both in our undergraduate studies in Chile and in postgraduate studies in Europe. Hence, we were clear that the contribution we could make to the present and future of our colleagues in the field was to create spaces for dialogue between hemispheres, genders, nationalities, races and ethnicities, a process of which we feel part and that calls for the decolonisation of the academy (Castro-Gómez & Grosfoguel, 2007). With this special issue, these intentions and objectives were made explicit and, although we still have a long way to go in order to learn and decolonise ourselves, we hope that this issue can make visible and give voice to possible dialogues that may emerge.

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