

Martha Nussbaum and Amartya Sen: An analysis of human development, individual freedoms and the capability for agency introducción

Martha Nussbaum y Amartya Sen. Un análisis en torno al desarrollo humano, las libertades individuales y la capacidad de agencia

Jesús Alfredo Morales Carrero

Universidad de Los Andes, Venezuela

lectoescrituraula@gmail.com

<https://orcid.org/0000-0002-8379-2482>

Recibido: 28/5/2024

Aceptado: 3/9/2024

Publicado: 31/12/2024

Cómo citar:

Morales Carrero, J. A. (2024). Martha Nussbaum and Amartya Sen: An analysis of human development, individual freedoms and the capability for agency introducción. *Integración*, 08 (2), 57-63. <https://doi.org/10.36881/ri.v8i2.957>

Fuente de financiamiento: No financiado.

Declaración de conflictos de interés: El autor declara no tener conflictos de interés

Abstract

The construction of dignified conditions for human existence is a widespread concern that has garnered significant attention from both governmental programs and global agendas, given its potential to confer meaning to a fulfilled life. This research, resulting from a qualitative document review, analyzes the contributions of Martha Nussbaum and Amartya Sen regarding human development, individual freedoms, and agency. Content analysis was employed to identify relationships, common arguments, and propositions that support the realization of individual and collective human potential based on these three constructs. The findings indicate that achieving a fulfilled existence as a universal ideal requires operationalizing individual freedoms and implementing agency capabilities as essential means to ensure human functionality in any context. These enable individuals to choose alternatives and seize opportunities, thereby enhancing quality of life and comprehensive well-being throughout the life cycle. This involves access to goods and services that meet needs related to physical and economic balance, health, employability, and education. The study concludes that achieving a fulfilled existence necessitates focusing personal, social, and institutional efforts on constructing a significantly dignified, healthy, and unrestricted life. In such a context, individuals can enjoy greater opportunities for realization, regardless of socio-historical limitations.

Keywords: Personal functioning, productive life, multidimensional well-being, inclusive social justice

Resumen

La construcción de condiciones dignificantes de la existencia humana constituye una de las preocupaciones generalizadas a las que tanto programas de gobierno como agendas globales han dedicado especial atención, por contener las posibilidades para otorgarle trascendencia a la vida plena. Esta investigación como resultado de una revisión documental con enfoque cualitativo analiza los referentes de Martha Nussbaum y Amartya Sen en torno al desarrollo humano, las libertades individuales y la capacidad de agencia. Se utilizó el análisis de contenido para precisar relaciones, argumentos comunes y planteamientos que redunden en la concreción de posibilidades de realización humana individual y colectiva fundada en los tres constructos trabajados. Los resultados indican que el alcance de la existencia plena como ideal universal requiere la operativización de las libertades individuales y la instrumentación de la capacidad de agencia, medios garantes del funcionamiento del ser humano en cualquier contexto; posibilitándole condiciones para seleccionar alternativas y asumir oportunidades que redunden en la consolidación de la calidad de vida y el bienestar integral a lo largo del ciclo vital. Esto involucra el acceso a bienes y servicios que satisfagan requerimientos asociados con el equilibrio físico, económico, en materia de salud, así como posibilidades de empleabilidad y educación. Se concluye que, alcanzar una existencia plena requiere enfocar los esfuerzos personales, sociales e institucionales que aporten a la construcción de una vida significativamente digna, salvable y libre de restricciones socio-históricas; en las que el ser humano goce de mayores oportunidades de realización dentro de cualquier contexto.

Palabras claves: Funcionamiento personal, vida productiva, bienestar multidimensional, justicia social inclusiva.

OPEN ACCESS
Distribuido bajo:



INTRODUCTION

To claim human dignity as a process widely recognized by global agendas demands as a *sine qua non* requirement the strengthening of the vision of sustained development in its full realization (Crespo, 2011; Sen, 2023). This means eradicating precariousness, poverty and discrimination as aspects that, when strategically overcome, constitute a way out to organize society based on equitable schemes, in which inclusive social justice materializes in access to opportunities associated with financing, health, education and scientific-technological mechanisms that support the existence adequate to the parameters of the so-called good life.

This search for the well-being of humanity is based on the empowerment of individual capacities, a process that suggests directing efforts towards the resizing of both competitive functionality and operation focused on the organization of priorities associated with the management of requirements on which balanced existence depends; a link that offers an alternative way to revitalize personal actions within the framework of individual freedoms, on which in turn depends the construction of possibilities to carry out entrepreneurial initiatives that substantiate significant achievements throughout life (Morales, 2020; Nussbaum, 1997; Sen, 1997).

In other words, the construction of opportunities for the timely and unrestricted development of the human being must be understood in its relationship with the exercise of the capacity for agency, as the orchestration of a series of categories associated with the freedom to make decisions and choose among a multiplicity of alternatives, aspects whose operational approach entails transformations in human functioning, which refer, among other aspects, to the expansion of the range of possibilities to consolidate the good life (Deneulin, 2019; Sen, 2011). Based on the above, this research aimed to analyze the references of Martha Nussbaum and Amartya Sen regarding human development, individual freedoms and the capacity for agency.

MATERIALS AND METHOD

This documentary research with a qualitative approach assumed the review of the works of Martha Nussbaum and Sen Amartya, from whom the theoretical, conceptual and epistemic references were taken based on which to support a series of approaches that approach a pertinent vision of human development, individual freedoms and capacity for agency; dimensions that currently respond to global social requirements associated

with the consolidation of full human achievement; in the same way, secondary sources (scientific and specialized journals) were reviewed to specify renewed positions that enrich the discussion.

Content analysis was used as a technique in order to specify the theoretical contributions, the conceptual and practical elements based on which an approach is made to the construction of solid reasons and consistent arguments that define not only the relevance of the theoretical positions of the authors, but also the challenges that the institutional apparatus and the States face in the task of operationally consolidating the constructs that are the object of study.

The criteria for analysis were considered to be direct references, statements and positions that reveal the importance, relevance and pertinence of the object of study today; the common aspects that provide solutions to the requirements of inclusion, social justice, equity and the common good, as well as active participation in public affairs and in the decision-making processes on which the transcendence of dignified lifestyles depends. With respect to the axiological criterion, the aim was to determine the ethical responsibility of the citizen in relation to social and political action, emphatically showing what each author refers to throughout their works.

The criterion of complementarity was used to specify theoretical and conceptual connections resulting from the contrast between main texts and secondary sources about the authors and between them, in an attempt to establish a theoretical-conceptual and epistemic dialogue that would show the concretion of actions linked to the commitment of the State and the synergistic participation of the citizen in the task of promoting joint initiatives associated with their well-being and quality of life.

Analysis of information

This section presents an analytical approach to the dimensions: human development, individual freedoms and capacity for agency; assuming for this purpose various theoretical, practical and epistemic positions that allow both the explanatory understanding and the connection of a series of statements that reveal the validity of the contributions of Martha Nussbaum and Sen Amartya today.

Human development. The ideal of all times.

The foundations of human development proposed by Nussbaum and Sen (1998) are constituted by the attainment of well-being, the achievement of unrestricted agency, the freedom to assume in conditions of autonomy the choice of goals and objectives that satisfy both individual and collective interests, as well as access to economic and financial resources that allow to promote actions that result in the multidimensional satisfaction of personal requirements and needs.

Although it is true that the elements mentioned constitute tangential axes that, when placed in synergistic relation, expand the possibilities of human development, access to education, health and dignified employability is fundamental, among which the expansion of opportunities to choose specific and general goals is needed, among which to determine those that most correspond to their benefits and contribute to the dignification of existence throughout the life cycle (Sen, 1997).

From this perspective, human development involves purposes that seek to strengthen the scope of happiness by adopting a collective vision of existence, which implies integration into the daily affairs of its immediate context, in which active participation is required until viable functionality is permeated; this process entails, among other aspects, overcoming basic and complex needs that give way to transcendence towards integrally consolidated societies (Sen, 2014).

This conjugation of aspects associated with dignified existence confirms that human development as a dynamic process supports its tasks in at least three fully identified dimensions, namely: the achievement of a longevity that is not only dignified but healthy, unrestricted access to information mechanisms that provide the necessary knowledge on the most recent updates in all areas of knowledge and the freedom to enjoy financial resources that allow humanity to undertake, satisfy personal requirements and needs on which its transcendence depends (Sen, 2020; Villarroel, 2019).

The above requires mentioning elements that support human development and that configure possibilities for its realization as a model of application in any context, since the elevation of the quality of life and integral well-being depend on its referents as universally recognized ideals (Sen, 1981), which focus their efforts on access to a health system that guarantees intervention and prevention, enjoyment of an appropriate nutritional scheme, having training plans, permanent education and updating, competitive integration in the labor

market, as well as having a legal system that guarantees the protection of their moral integrity (Ibañez, 2016; Nussbaum, 2004; Sen, 2010).

Strictly speaking, human development as part of the ideals of the political-economic and global political agendas, has its basis in the expansion of the possibilities to participate in the various opportunities for full realization; This refers to the exercise of real and fundamental individual freedoms, on which the enhancement of functional and operational human performance within the framework of inclusive social justice depends in a significant way.

In these terms, human development is closely related to the freedom to exercise leadership as a protagonist, as well as to assume critical positions in order to build alternatives for well-being that minimize the effects of the so-called systematic social deprivations responsible for historical exclusion, which have made the consolidation of human dignity impossible. This is closely related to the praxis of individual agency on which the concretization of interests and preferences depends, as well as the cultivation of initiatives associated with progress in terms of the satisfaction of basic and complex needs (Sen, 2014).

Individual freedoms and human rights

Life in democracy as a global task involves among its intentions the strengthening of freedoms associated with deciding, acting and participating in any context; for Nussbaum (2010) and Sen (2014), individual freedoms entail the protection of pluralism, the recognition of diversity as well as the particular requirements of each society, among which are mentioned: the expansion of the possibilities to manifest the will and express ways of seeing the world, freedom to build organizational and association forms without leaving aside the conscious action that allows the subject to specify opportunities, prioritize needs, and prioritize the common good that makes possible the emergence of the well-being that everyone requires.

These individual freedoms are specified as mechanisms that guarantee effective action in social life, which only reach their fulfillment in reality through their interconnection, since it is in this process that the restrictions to which the impossibility of facing the demands associated with personal performance are attributed are overcome; These freedoms involve access to financing systems capable of providing the economic resources to promote initiatives that support the improvement of the quality of life, in an attempt to

respond to equity criteria that contribute to addressing the exclusion that has historically threatened to denigrate the human condition.

This access to economic resources as individual freedom involves the real possibility of participating in productive activity as a revitalizing process, whose purpose integrates the exchange of goods and services associated with the satisfaction of basic needs; this, in its connection with the approach to the capabilities of all individuals, must be understood as the way to reduce dependency and transcend towards the synergistic unification of efforts that result not only in human well-being but also in the economic development of the context of life.

Consolidating economic freedom requires, among other aspects, emphatic and strategic support for individual and collective investment, as a starting point for undertaking sustainable goals that allow subjects to participate in negotiation processes at all levels, assuming for this the resizing of competitiveness, as well as the opportunities that are backed by resources that allow achieving the maximization of lasting benefits.

From the above arises another of the individual freedoms, such as access to mechanisms, programs and activities of continuous training that in their inclusive and operational sense help the subject not only in the consolidation of their cognitive dimension, but in the breaking of mental schemes associated with the reproduction of patterns of life that are barely effective, also denying the opportunity to transcend towards new paradigms woven by innovation, inventiveness, and creation that, in addition to resizing intellectual work (Sen, 2014), also contribute to the eradication of defective, obsolete and decontextualized approaches with respect to the requirements of a constantly changing reality.

Promoting education as individual freedom is also understood as a liberating process from the socio-historical ties that have conditioned human existence to discrimination, to the reduction of opportunities to a few and to the exclusion derived from illiteracy that makes it impossible for certain segments of society to experience the disadvantage of not having the comprehensive, analytical and reflective capacity from which to manage the resolution of complex problems (Morales, 2022; Sen, 2021). Educating in this sense suggests inserting the subject into a broader and more open vision of interdisciplinary work (Nussbaum, 2010), through which to achieve the integration of actions, strategies and methodologies that make the approach to everyday

situations more effective.

Another freedom has to do with well-paid employment; the diversification of jobs and occupations implies the configuration of the foundations of growth in other dimensions associated with access to material goods, sources of financing and resources to drive productive initiatives; This also involves the institutional commitment to reducing excesses in terms of labor regulations and, instead, encouraging ongoing training as the revitalizing force of existing productive schemes as well as the transcendence towards new systems of greater scope in terms of entrepreneurship (Sen, 2014).

On the other hand, the promotion of social investment as a responsibility of the State translates into the creation of possibilities to capitalize on the competencies and skills that, when put into synergistic relation, not only constitute a way of increasing the production of wealth, but also promote economic development (Sen, 2020); this means deploying institutional actions that operate based on specific dimensions linked to access to quality educational and training systems, participation in initiatives, programs and public policies that guarantee ongoing training and updating.

Capacity for agency and collective action

Participation in public affairs, as well as the scope of the integration committed to institutional initiatives associated with the transformation of society, is one of the aspects that mediate the capacity for agency; this involves acting based on the co-responsibility of contributing from one's own living space in relation to the promotion of human interests (Nussbaum, 2012; Sen, 2023), with the purpose of helping in the solid concretion of the conditions of equality that allow building a life free of deprivation.

In this sense, the capacity for agency as the axis of effective social inclusion aims to outline possibilities of action, decision and human performance that allow those who exercise them to implement goals and objectives that provide continuity to a dignified existence; this means expanding the possibilities to proceed ethically in any context until achieving results that, because they are based on well-being, compel humanity to redefine its living conditions.

Therefore, it is necessary to see in the capacity for agency an opportunity to achieve social prosperity and to overcome the crisis generated by the devastating effects of poverty through the establishment of social

agreements in which each subject, aware of their limitations but also of their potential in terms of capabilities, uses their individual agency with ethical commitment to build more inclusive, fair and equitable systems that make human actions the basis for a functional society (Morales, 2021).

Consequently, the capacity for agency as an axis of leading action within any context requires democracy to guarantee participation within the framework of inclusive social justice, an ideal that, in addition to guaranteeing an existence permeated with co-responsibility, also responds to an indication of the willingness to take on the challenge of having the cognitive arsenal and resources necessary to transform one's own environment to achieve the goals of human dignity, among which are: the achievement of the common good, the creation of means and mechanisms that result in greater multidimensional benefits, and the adoption of commitment to others as a collective attitude on which functional collective life depends (Roca Jusmet, 2022; Sen, 2001).

DISCUSSION

The idea of human dignity in Nussbaum and Amartya is understood as the result of the insertion of the subject in the matters associated with his individual performance within the social world, which involves the freedom to participate in the construction of a life sustained by co-responsibility with public life (Nussbaum, 2004), a process that involves the use of institutional initiatives, both collective and individual, as mechanisms through which to claim not only the duties of inclusive social justice, but also the conscious synergistic unification of efforts that make possible the resizing of the necessary competencies to promote transcendental and ambitious objectives.

In these terms, human development as a common transversal axis in the authors' approaches begins with the strengthening of existing capacities as well as with the discovery of new capacities that open the way to a full life; In the words of Nussbaum (2012), these capacities must be based on the literacy of humanity as a permanent process that involves tasks such as helping to access decent employment opportunities, whose dividends result in the satisfaction of complex needs.

This global task involves the action of the State in the task of offering diverse training alternatives, which allow society to transcend towards the creation of its own innovation and entrepreneurship initiatives, in which each subject without discrimination manages to promote

productive activities that guarantee the overcoming of the deficiencies and insufficiencies that have historically determined precariousness in relation to lifestyles (Sen, 1997). In a strict sense, these purposes are understood as reiterative tasks of a break with discrimination patterns, which urge humanity to assume, through proactivity, the attainment of sustainable living conditions.

From there, the exercise of individual freedoms is assumed as a tangential element of a dignified life as devices that not only seek the realization of personal autonomy but also the awakening of consciousness about one's own potentialities, which when operationalized constitute instruments to achieve the independence that grants vitality to personal initiatives (Colmenarejo, 2016); this reach of autonomy as a consequence of individual agency seeks to break with the ties of predetermined recipes that seek to frame the possibilities of life to outdated schemes and, consequently, seeks to transcend towards the consolidation of individual well-being that added resizes collective life.

In this sense, the capacity for agency as a process of individual and collective empowerment seeks to revitalize human action by permeating it with effectiveness, in an attempt to provide operational potential to the life alternatives on which the qualitative improvement of existence depends (Sen, 1995); According to Nussbaum (2012), these living conditions attribute to the responsible performance of the subject the responsibility of carrying out valuable actions, whose usefulness not only results in the satisfaction of personal requirements, but in the scaffolding of a fair equality that serves as a foundation to achieve quality of life as a global ideal.

The above requires the treatment of a key concept within the postulates of human development proposed by Nussbaum and Sen (1998), it is about living well, a process that in addition to consolidating itself progressively also integrates in a synergistic relationship the individual active functioning, the collective and personal capacities, as well as the ethical conduct, elements that in addition to adjusting existence to dignified parameters also contribute to the achievement of human longevity in terms of integral well-being.

Hence, the emphasis on promoting institutional reforms that guide human existence towards normative schemes that respond to real needs, whose effectiveness is achieved through the search for greater criteria of equality among citizens, but which seek as strategic objectives to achieve the attainment of autonomy for the exercise of rights inherent to human beings. Nussbaum

(2010) and Sen (2014) attribute to these institutional reforms the scope of new standards of effectiveness, as well as the capacity for social scope that favors without distinction the access to the so-called material opportunities.

In these terms, it is considered essential to integrate efforts associated with the creation of a citizen awareness that guides humanity towards the eradication of actions outside the norm, among which are acts of corruption that limit not only the effective institutional functioning but also the violation of the right to enjoy a full life, fundamentally of those whose social and economic conditions are not favorable (Colmenarejo, 2016; Sen, 2006). In this sense, turning towards criteria associated with the protection of moral integrity, as well as the dispensing of justice, are required as responses from the State that not only guarantee greater possibilities of citizen security, but also contribute to the consolidation of the quality of life.

Conclusions

Building the foundations of human development as well as its full realization, in a broad sense, means expanding the conditions that support the exercise of individual freedoms, with the aim of ensuring that individuals achieve the enjoyment of an existence without deprivation and, yes, anchored in the empowerment of multidimensional human performance that makes their full realization possible; this involves tangential tasks that range from the operationalization of leading participation to the praxis of co-responsibility in one's own affairs and those of all, to the search for the common good that guarantees the coherent functioning of the context of which one is a part.

The above implicitly indicates that the agency is closely related to the proactive attitude of establishing interconnections that drive social efforts, thus capitalizing on the orientation of personal and collective interests towards beneficial ends that result in the cultivation of real and concrete initiatives; This must be understood as the combination of inventive capacity, which, together with ongoing training, enhances the possibilities of development, leading, among other aspects, to the resizing of the conditions of freedom and autonomy required to face the global requirements of today.

The above must be understood as dimensions in terms of which to guarantee not only the possibility of interacting with the world, but also to assume from an active position equal and fair participation within the multiplicity of challenges imposed by each reality, whose dynamism and transformation urge the deployment of the necessary capacities to consolidate the attainment of full happiness, as the support of an existence mediated by living well and without restrictions; that is, leading a decent, virtuous and functional existence throughout the life cycle.

With respect to the implications for future research, it is worth saying that in the postulates of Nussbaum and Sen, operational, functional and real responses are required in terms of which to consolidate alternatives associated with human development. Some of the limitations that were identified refer to access to updated literature that contributes to the substantiation of contextualized references and proposals that integrate the constructs worked on; this leads to the scarce availability of generalizations regarding the theorization of human development in its relationship with individual freedoms and the capacity for agency.

BIBLIOGRAPHIC

- Colmenarejo, R. (2016). Enfoque de capacidades y sostenibilidad. Aportaciones de Sen Amartya y Martha Nussbaum. *Ideas y Valores*, 65 (60), 121-149. <https://dx.doi.org/10.15446/ideasyvalores.v65n160.43084>
- Crespo, R. (2011). Las tensiones de la idea de justicia en Amartya Sen. *Cultura Económica*, 29 (81), 27-30. <https://erevistas.uca.edu.ar/index.php/CECON/article/view/1477>
- Deneulin, S. (2019). Desarrollo humano integral: una aproximación desde la tradición social católica y el enfoque de las capacidades de Amartya Sen. *Revista de Estudios Sociales*, 1 (67), 74-86. <https://doi.org/10.7440/res67.2019.06>
- Ibañez, E. (2016). Sen y los derechos humanos: la libertad como

objeto material de los derechos humanos. *Pensamiento, Revista de Investigación e información filosófica*, 72 (274), 1119-1140. <https://doi.org/10.14422/pen.v72.i274.y2016.003>

- Morales, J. (2020). Una política pública para potenciar la calidad de vida y el desarrollo humano. Universidad de Los Andes. *Revista Estado de Derecho*, 2 (1), 119-146. <https://doi.org/10.53766/ESDER/2020.01.03.05>
- Morales, J. (2021). Un acercamiento multidisciplinar a las dimensiones del desarrollo humano. *Revista Conocimiento Educativo*, 8 (1), 23-57. <https://doi.org/10.5377/ce.v8i1.12589>
- Morales, J. (2022). Sen Amartya. Aportaciones teórico-

- metodológicas y propuestas al desarrollo humano en discapacidad. *Paradigma Revista de Investigación Educativa*, 29 (47), 163-182. <https://inieces.vrip.upnfm.edu.hn/ojs/index.php/Paradigma/article/view/143/62>
- Nussbaum, M. (1997). *Justicia poética. La imaginación literaria y la vida pública*. Editorial Andrés Bello Española.
- Nussbaum, M y Sen, A. (1998). *Calidad de vida*. Fondo de Cultura Económica.
- Nussbaum, M. (2004). *La fragilidad del bien, fortuna y ética en la tragedia griega*. Machado Libros.
- Nussbaum, M. (2010). *Sin fines de lucro. Por qué la democracia necesita de las humanidades*. Katz Editores.
- Nussbaum, M. (2012). *Crear capacidades. Propuesta para el desarrollo humano*. Paidós.
- Roca Jusmet, J. (2022). Amartya Sen; un hogar en el mundo. Memorias (2021). *Revista de Economía Crítica*, (33), 129-133. <http://revistaeconomiacritica.org/index.php/rec/article/view/629>
- Sen, A. (1981). *Elección colectiva y bienestar social*. Alianza Editorial.
- Sen, A. (1995). *Nueva economía del bienestar*. Publicacions de la Universitat de València.
- Sen, A. (1997). *Sobre la desigualdad económica*. Ediciones Folio.
- Sen, A. (2001). *Identidad y violencia. La ilusión del destino*. Editorial Katz.
- Sen, A. (2006). *Valor de la democracia*. Ediciones de Intervención Cultural.
- Sen, A. (2010). *La idea de justicia*. Editorial Aguilar.
- Sen, A. (2011). *Desarrollo y crisis global*. Editorial Complutense.
- Sen, A. (2014). *Desarrollo y libertad*. Planeta Ediciones.
- Sen, A. (2020). *Sobre ética y economía*. Alianza Editorial.
- Sen, A. (2021). *Un hogar en el mundo*. Taurus.
- Sen, A. (2023). *Recursos, oportunidades y bienestar*. Editorial Aranzadi.
- Villarroel, G. (2019). Libertad de conciencia: notas sobre el pensamiento de Martha C. Nussbaum *Serendipia*, 12 (7), 5-26. http://saber.ucv.ve/ojs/index.php/rev_s/article/view/14512