Education between individual freedoms and social arrangements: the case of African graduates in Bulgaria (1960–1990)

Vesselina Kachakova ⓘ* and Svetla Koleva ⓘ

Institute of Philosophy and Sociology, Bulgarian Academy of Sciences, Sofia, Bulgaria

The contradiction between the gains achieved in educational attainment in African countries and the persistence of individual and social vulnerability raises questions about the role of education in the development of both individual freedoms and social well-being. Searching for an interpretative key to this paradox, we have turned to the capability approach, developed by Amartya Sen, as offering a broad theoretical framework for the assessment and evaluation of individual freedoms and social arrangements. The research relies on archival documents from various socialist institutions in Bulgaria and 19 interviews with African graduates who studied in Bulgaria during the period 1960–1990. Viewed through the lens of Sen's capability approach, their educational and professional development reveals the spectrum of opportunities available to individuals as a result of different agreements in the field of education, as well as the deficits and limitations that affect individual and social well-being due to uncertain and changeable social arrangements at macro level. The intention of this research is a call for further development of the capability approach to better understand the dynamic relationships between individuals and social structures, the making of conversions and alternative combinations, and their influences on societal functioning. A possible direction for this development can be seen in Margaret Archer's concept of corporate agency and collective capacity. Collective agency is viewed as a possible bridge between individual agency and the social arrangements needed for effective societal change.

KEYWORDS

capability approach, development, education, individual freedoms, social arrangements

Introduction

At the core of this article is a long-observed paradox, one that has been empirically established by numerous studies but so far unproblematized. During the decolonization of the African continent, which coincided with the Cold War period, hundreds of thousands of citizens of the newly liberated countries received secondary special and higher education in

the socialist bloc.[1] Their education was an intersection of interests among the African countries and the countries where they studied. While African countries liberated from colonialism received the specialists needed for their development, socialist bloc countries expanded their influence through the African specialists trained there. The post-1989 social transformations in both Eastern Europe and Africa changed the educational policies of these former partners. There was a sharp decline in the admission of foreign students from Africa in the former socialist countries which has only begun to be overcome in recent years.[2] Both before and after 1989, the postcolonial development of African countries was marked and continues to be marked by high levels of brain drain and low levels of human and social development.[3] This contradiction between the gains achieved through educational attainment in African countries and the persistence of individual and social vulnerability raises questions about the role of education in the development of both the individual and society as a whole. In the search for an interpretative key to this paradox, we have turned to Amartya Sen's capability approach as offering a broad theoretical framework for the assessment and evaluation of individual freedoms and social arrangements.

Our research focuses on African graduates who studied in Bulgaria during the period 1960–1990. This spatio-temporal

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1   It is difficult to obtain a statistically accurate and complete picture of Africans who pursued higher education in the former socialist bloc during the Cold War, including information on their numbers, their distribution by country of origin, host country, university programs, gender, age, year of study, etc. There are many reasons for this – from the exclusive focus on leading countries such as the former USSR, the United States, France, Great Britain, and West Germany (Katsakioris, 2007; Katsakioris, 2017), to the differing principles for collecting statistical data in each country (Kamenova, 2005; Boltovskaja, 2014; Gheorghiu and Netedu, 2015) and the various definitions of the student category. As Béthune and Leclerc-Olive (2013) clearly show, the Central Intelligence Agency (CIA) works with the category "academic students," while UNESCO collects data on "international students." However, according to the data from UNESCO, the New York Institute of International Education, and the Council for Mutual Economic Assistance (CMEA), two trends can be noted. Firstly, while in the 1960s the number of African students arriving in the USSR was between two and three times lower than those going to France, the United Kingdom, or the United States, "from 1979 onwards, African students trained in the USSR outnumbered those going to study in the United Kingdom, and from 1988 to 1991 even outnumbered those going to the Unites States" (Yengo and De Saint Martin, 2017, p. 235). Secondly, the country hosting the largest number of African students throughout the period was the former USSR, followed by the former GDR, the former Czechoslovakia, Poland, Romania, Hungary, and Bulgaria.

2   See De Saint Martin et al. (2015); Yengo and De Saint Martin (2017).

3   Since 1990, when the Human Development Index (HDI) was initiated, the entirety of Sub-Saharan Africa has consistently ranked among the countries with medium and low levels of human development. As early as 1990, the UNDP report noted: "[…] although the remarkable progress that the developing countries have made towards education and human development in the period 1960–1990: adult literacy rates rose from 43% in 1970 to 60% in 1985 and 1.4 billion literate people in the South in 1985, compared with nearly a billion in the North […] the tremendous human deprivation remains. In 1990 there still were nearly 900 million adults in the developing world who cannot read or write, etc." (UNDP, 1990, p. 17).

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delimitation is not fortuitous. Firstly, the period 1960–1990 is of particular importance in the political, social, and educational history of both Eastern European and African countries. The late 1950s and early 1960s were a pivotal period for socialist countries emerging from the era of Stalinism, as well as for African countries embarking on the road to independence. The first bilateral cooperation agreements between Soviet bloc countries and independent African countries date from the early 1960s. For almost three decades, Eastern Europe served as a model for African countries with socialist-oriented governments, or at least presented an alternative to Western capitalism, until the Soviet bloc collapsed. This disintegration indirectly led to profound changes in African states too. It can be said that from 1989 to 1990 both groups of countries entered a phase of radical transformations. Secondly, being the smallest, closest in proximity, and most committed to the policies of the former Soviet Union within the socialist bloc, Bulgaria presents an interesting case in a double sense. On the one hand, despite the harmonization of national policies in the then-socialist countries toward Africa and their subordination to the international imperative, Bulgaria applied the general directives of the Council for Mutual Economic Assistance (CMEA or Comecon)[4] in accordance with its national interests. On the other hand, insofar as it was the country with the most marginal role and power of influence within the Comecon, its educational practices vis-à-vis African countries can metaphorically be seen as a kind of *camera obscura* that provides both a zoomed-up and inverted image of the observed dependencies and paradoxes. Thirdly, although the subject of study refers to the recent past, its examination through the capability approach could shed light on contemporary policies and practices and the opportunities and arrangements they provide.

In order to understand the role of education in restructuring or reconfiguring the set of possibilities open to an individual amid radical changes in social, economic, and political conditions, as well as the implications of this transformation for both individual "development as freedom" and for the development of society itself, we explore the educational and professional trajectories of Africans who graduated from the socialist system of higher education in Bulgaria in the 1960s–90s. In line with Sen's capability approach, we pose several key research questions. If education is both a means of enhancing agency and a personal and social conversion factor, what were the opportunities offered by social arrangements in bilateral education cooperation agreements between Bulgaria and African countries, and how have Africans who studied in Bulgaria used them to achieve "alternative functioning combinations" (Sen, 2000, p. 75) and well-being? What happened to the academic and professional experience accumulated in the socialist society; was it recycled in post-colonial and post-single-party regimes? Can individual capabilities as a relationship between individual agency and social arrangements be a guarantor not only of individual well-being but also of the well-being of society, leading not

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4   The Council for Mutual Economic Assistance (In Russian *Sovét Ekonomícheskoy Vzaimopómoshchi*, СЭВ) was founded in 1949 by the Soviet Union, Bulgaria, Czechoslovakia, Hungary, Poland, and Romania as a response to the formation of the Western OECD. Until 1991, it was the main organization of socialist economic cooperation through multilateral accords and bilateral agreements within the Eastern bloc and with socialist-oriented states across the world (Kaser, 1967).

only to the improvement of lives but also of social arrangements, making them more appropriate and effective (Sen, 2000, p. 31)?

We seek to answer these questions by testing the following interrelated hypotheses: (1) The space of possibilities open to an individual consists not only of opportunities but also of deficits; (2) Education is one of the most powerful individual conversion factors for reworking available conditions and (dis) arrangements, but its effectiveness as such a factor – especially in the face of radical economic, political, and social change – depends on the importance attached to it in a given society; (3) The well-being and individual "development as freedom" that education provides could contribute to the common well-being of society only when individual "alternative combinations" become an integral element of social change toward a better and fairer society.

Through an analysis of archival documents of bodies and institutions conducting the educational policy of the Bulgarian state toward African countries, along with interviews with African students trained in Bulgaria in the 1960s–90s, we will try to defend the thesis that the role of education in human development and well-being passes through a series of relationships between individual agency and social (dis) arrangements and that the connection between individual capabilities and the achievement of social development is not as direct and feasible as Sen suggests (Sen, 2000, pp. 4–5). In doing so, we intend to offer a reading that complements discussions around the capability approach, placing emphasis on the continuous interaction between individual freedoms (as a condition for agency and the freedom of agency) and social (dis) arrangements, where the role of higher education as both a means of enhancing agency and a conversion factor not only stands out, but a different valence opens up a vast range of adult capabilities in societies where education strengthens common well-being, as well as in societies in which developed capabilities are wasted (another open question).

Education of African students abroad post-decolonization: setting the context

The onset of decolonization presented newly liberated African countries with a new problem. Independence freed them not just from colonizers but from cadres in all spheres of society. The creation of their own professionals to guarantee the country's self-development became the primary task of new African governments, and investment in education was a political priority. In the context of the Cold War, the socialist countries united by Comecon quickly grasped the educational stakes of the postcolonial situation and their advantage over the former colonizers of the West. Unencumbered by a colonizing past, socialist countries become an exemplar for the postcolonial world with an educational model that provided free education for all. Since the late 1950s and early 1960s, the Department for the Coordination of Technical Cooperation of the Comecon Secretariat had been expanding the general policy of socialist countries to assist developing nations in ways that were expressed in various programs, one of which was the training of these countries' national cadres in the secondary specialized and higher educational institutions of the old Comecon members (Katsakioris, 2019; Kachakova and Koleva, 2022).

In line with this general policy and its directives, Bulgaria began training a few dozen students from developing countries of Africa, Asia, and Latin America in the late 1950s. The number had grown to include 3,434 African citizens who received their higher education in Bulgaria (according to data from the Institute of Foreign Students/IFS) by the mid-1980s. This occurred thanks to bilateral agreements signed and updated annually between Bulgaria and the country concerned. These agreements specified the parties' commitments regarding costs (scholarships, in most cases, were borne by the Bulgarian state or various international institutions such as UNESCO, the UN, etc., while travel costs were borne by the African country), the number of students, majors of study, etc. Within Bulgarian society, all organizations implementing the state policy toward developing countries in the field of education (IFS, Committee for Friendship and Cultural Relations with Foreign Countries, Committee for Solidarity with the Peoples of Africa and Asia, Communist Union of Youth/DKMS, grassroots parties, trade unions, Communist League organizations in educational institutions and enterprises, etc.) were mobilized in creating educational opportunities for foreign students in Bulgaria. Apart from the educational goals they set themselves, these agreements also had a purely ideological dimension. The creation of adherents to socialist regimes and the application of the political societal project of communist parties by African graduates of the socialist education system on their return to their countries were integral to the design of these agreements.

Although university training for African students in the countries of the former socialist bloc had been taking place since the late 1950s, this phenomenon barely attracted systematic research interest in the two decades after the end of the Cold War. This is not to say that economic, political, cultural, and geostrategic cooperation between the countries of the communist East and Africa was not studied throughout the Cold War. There are many publications on the subject. But it is in the context of the reconfiguration of geopolitical relations since the collapse of the communist regimes in Eastern Europe and increasing globalization that the education of Africans in former socialist countries has emerged as a multi-faceted, interdisciplinary field of research undertaken by African, Eastern European, and Western researchers. The thematic emphases are different. Work is being done on training African cadres in Eastern Europe (Koudawo, 1992; Katsakioris, 2007), on the experiences of study and daily life in the East (Boltovskaja, 2014; De Saint Martin et al., 2015; Katsakioris, 2015; Mellakh, 2016), on the African elites trained in the East and their role in the construction of post-colonial states (Leclerc-Olive, 2016; Leclerc-Olive and Hily, 2016; Cahiers D'études Africaines, 2017), on socialist migration regimes (Apostolova, 2023), etc. In contrast to the long-dominant trend of research focusing exclusively on relations between the Soviet Union/Russia and Africa (Matusevich, 2007; Kurgat and Kurgat, 2012), the geographical scope of contemporary studies on the education of African students in Eastern Europe is expanding to include other Eastern bloc countries (Romania, the former GDR, Hungary, Poland, Cuba, Bulgaria) as well as various African countries.

Yet, until now, the education policies of former socialist countries toward Africa and the education they offered to young Africans have not been studied through the 'encounter' between individual objectives, dreams, and strategies and the institutional and structural arrangements put in place to meet state, national, and international objectives. In line with the capability approach developed by Nussbaum and Sen (1993), we seek to understand what African students studying in Bulgaria were able to do and be: what opportunities and freedoms of choice and agency did they have during their studies and after graduation? We have limited ourselves within Sen's approach insofar as capability is a form of freedom for him: the substantial freedom to achieve "alternative functioning combinations" (Sen, 2000, p. 75). What he calls "substantial freedoms" ("combined capabilities" in Nussbaum's terms,

2012) are a set of usually interdependent possibilities for choosing and acting, and "a person's capability set depends on a variety of factors" (Boyadjieva and Ilieva-Trichkova, 2021, p. 52), "including personal characteristics and social arrangements" (Sen, 2000). This framework enables us to study the social arrangements within the field of education through the eyes of individuals as well as the relationship between individual agency and social arrangements and its potential to ensure societal well-being, social freedom, and conditions for social change. Thus, we accept Sen's theoretical understanding that individual freedom is quintessentially a social product within a two-way link between (1) social arrangements to expand individual freedoms and (2) the use of individual freedoms not only to improve lives but also to make social arrangements more appropriate and effective (Sen, 2000, p. 31). It is interesting to observe how this relationship actually plays out in a given society, especially during societal changes.

By using the capability approach to examine the education of African graduates in Bulgaria in the 1960s–1990s as a point of tension between individual freedoms and social arrangements, we are inclined to envisage a dual contribution to sociological research. On the one hand, the theoretical perspective on the university education of Africans in the countries of Eastern Europe during the Cold War is deepened, making it possible to highlight the contradictions in educational policies (between the opportunities offered and deficits in the system) as well as the agency of students and their ability to transform circumstances into assets. Furthermore, the object of study itself sheds light on the capability approach and shows the need to investigate the intermediate stages between individual capability and societal well-being.

Materials and methods

In order to explore African students' agency and capabilities for studying in the People's Republic of Bulgaria in the context of state bilateral agreements executed between 1960 and 1990, we rely on archival documents from various socialist institutions in Bulgaria (the Central Committee of the Bulgarian Communist Party/CC of the BCP, Ministry of People's Education, and Institute for Foreign Students/IFS, among others) and on 19 interviews conducted between October 2021 and August 2022 with former exchange students from Africa who came to study in Bulgaria between 1978 and 1991. There are 9 from Nigeria, 5 from Benin, 2 from Tanzania, 1 from Zambia, 1 from Ghana, and 1 from Malawi. They studied mainly in Bulgaria's capital, Sofia, and two other major cities: Plovdiv and Varna. The students were enrolled within different university programs – 6 of them studied technical specialties, 4 studied medicine, 3 studied economics, 1 studied computer science, 1 studied nuclear physics, 1 studied agronomics, and there are 3 graduates of the Academy of Social Sciences and Social Management of the Bulgarian Communist Party (ASSSM of the BCP)[5] who chose to study anthropology, international tourism, and theater directing.

To find research participants, interview requests were sent to a Facebook group for Africans educated in Bulgaria, explaining the research interests concerning their life trajectories before, during, and

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5   Similar political education institutions existed under the Communist Parties of all the then-socialist countries. Irrespective of the (non-political) specialty chosen, they trained the senior cadres of the communist nomenklatura.

after their time in Bulgaria. Seventy-three people responded to the call, all of whom met the selection criteria set for interviewees. About one third of them, after initially agreeing to an interview, did not show up on the agreed day and time. Subsequent contact attempts were unsuccessful. The interviews focused on their decision to come to Bulgaria, route into higher education, experiences with everyday life, and subjective goals. The interviews on average lasted for 80 min. They were conducted in Bulgarian, English, and French through the Zoom and Google Meet platforms. Respecting the rules of anonymity, the interviewees' answers are presented here only with an interview number and the initials of the respondents' names.

Results

Expanded versus reduced individual freedoms: African students in Bulgaria (1960–1990)

The archival documents that reveal the national and supranational level social arrangements for educating African cadres in the Eastern bloc did not aim to broaden individual freedoms but to fix African countries' needs for professionals with the number of available university places. Often the demands exceeded the existing structural capacity and created different deficits. The whole process was top-down oriented rather than initiated by the individuals themselves. The stories of our respondents present the context of their decisions to come and study in Bulgaria and how such opportunities to study abroad paralleled particular limitations. They could rarely choose what and where to study because it had already been predetermined. As one of the respondents shared: *"I sent the application to Bulgaria and I wanted to study Architecture, however they gave me something else [Informatics] and I did not have much choice"* (01_K.M.).

Different formal and informal structures on both sides of the bilateral agreements (between Bulgaria and the respective African country) encouraged or even initiated students' decisions to study abroad, particularly in Bulgaria. From the Bulgarian side, these included the CC of the BCP, the Ministry of Education, the Ministry of Foreign Affairs, the Committee for Scientific Cooperation, the Committee for Solidarity with the Peoples of Asia and Africa (CSPAA), and various political organizations, embassies, etc. From the side of African countries, the institutions providing information on available scholarships included the government, ministry of education, or a special institute for internships, and other sources included radio stations, newspapers, relatives, etc. Here are some examples of the provided information about opportunities to study in Bulgaria:

> When I was there [in the barracks], I saw in the newspaper that I had the opportunity to study in Bulgaria and the Soviet Union and other socialist countries. And I came to Bulgaria (01_K.M.).

> There was an institute in [name of the country] which dealt with everything related to scholarships, under the Ministry of Foreign Affairs. Through this institute I was informed that there was a possibility for me to go to Bulgaria (15_C.A.).

Considering the diverse paths they took to come and study in Bulgaria, it was worth finding out how these future African students

decided to leave their countries and pursue their higher education abroad, particularly in Bulgaria. Some of them mentioned chance as their reason: *"I may say quite by accident. I wanted to go anywhere. The first opportunity that arose for me was Bulgaria* (01_K.M.). Others – curiosity and the desire to explore other worlds:

> *Well, I simply wanted to go out and experience the outside world … So between the two worlds, the capitalist world and the socialist world or Communist world, we felt that Bulgaria actually had a choice of either going to East Germany or going to Bulgaria. And I liked what I read about Bulgaria (09_T.S.).*

The advice of a significant adult was also important to the decision of some of them:

> *I don't know, I choose Hungary; Bulgaria is not among the choice of the countries… a friend of my dad who works in the Ministry of Education, he came to our house late in the night and that he's thinking Bulgaria is the right choice (10_A. G.).*

> *My mother did, she recommended it, and many parents have recommended their children to go abroad, as they think that there are greater opportunities abroad (02_ S.M).*

For others, there was a political reason to come and study in Bulgaria: "My father was a trade unionist… so we are selected for political training in socialist system" (06_B.O.).

There were also people who knew why they wanted to study in a particular country or region and a specific field:

> *Well, my decision to come to Bulgaria was based on my need for further education. I had graduated from the university when I was looking for a chance to, to go for further education. And then it came about through a scholarship to Bulgaria. That's how I came there (04_D.F.).*

As a whole, they explained their decisions as part of a widespread trend (produced by existing political and social arrangements):

> *There was something then, I think it was in almost all of Africa. In the 70s, 80s, people thought it was better to study in Europe. If you studied in Europe it would be better. As a mindset. And we were doing all we could (19_A.L.).*

Data from the interviews with African students show that their choice of where and what to study depended on external obstacles, often determined by particular social arrangements, even though the opportunity was related to their personal goals and internalized as a personal decision to follow. Their answers provide evidence that these social arrangements expanded individual chances for studying abroad but simultaneously directed them according to the countries' needs rather than individual ones.

To further examine the tension between social arrangements and individual freedoms, we apply Sen's dimensions of freedom (political freedoms, economic facilities, social opportunities, transparency guarantees, protective security) to the experience of African graduates in Bulgaria (1960–1990) and compare the state social arrangements and the manifestations of individual agency in terms of the respondents' choices, perceptions, and actions. Going into the details

of these dimensions of freedom, our objective is to show the influence of social arrangements over personal choices and capabilities for action, as well as to discover how our respondents managed to accept, adapt, or rearrange the deficits of these social arrangements according to their own personal goals.

Political freedoms and ideological influence through education

The principle of unity in training and education set out by Comecon directives was among the basic norms and value orientations of the educational policy of the Bulgarian state toward both Bulgarian students and foreign students and postgraduates. This principle was embodied in the instructions of all institutions responsible for the admission and education of foreign students in Bulgaria. Following it, the main task of the Bulgarian Institute for Foreign Students (IFS) — one of the most important actors in the execution of educational programs — was to train and educate foreign students from their arrival in the country until their graduation. Another important task highlighted in the policy documents was *"to carry out on a broad basis ideological-educational and cultural-mass work, to assist in carrying out the international training of the Party and the government. [..] Great attention has been devoted to [..] creating love for Bulgaria, for socialism, peace and progress, in the struggle against imperialism"* (CSA, fund 763, inventory 2, a. f. 39).

Our respondents provided different perspectives about how they experienced this ideological work. Some of them saw rather an advantage for themselves in the concrete actions through which the institutions carried out this task (e.g., trips around the country, summer and winter camps, etc.): *"[…] most of us were very happy with these events. The purpose of which I do not care what it was, but it was very nice. I did not care because it was a nice 5 days at Golden Sands [seaside resort in Bulgaria]. All paid for, who can say no?"* (01_K.M.).

For others, it was something they accepted, even if they did not like it:

> *As a matter of fact, I accepted it as it was. And that is why I moved on. And accepted it, I know that when I did BCP [Bulgarian Communist Party] as a subject at school, one year or two, I know that the Communist party is not part of what I want, so I just pass my exam and that's all, but I know that it has made me a better person as I am today (10_G.A.).*

It also caused some difficulties when they refused to follow the expectations:

> *At that time, in order to be able to graduate, on the first page of the dissertation you had to thank, to write about the BCP. You have to thank them for giving you the opportunity. I, for example, did not write such things. And that's why I graduated much later. It's subtleties like that that gave me problems. My supervisor was not a [Communist] Party member. That time was serious, really. Those who don't want to live the Party way — there are always consequences (03_A.L.).*

The respondents differed in the ways they accepted the ideological work which was part of their educational program. They generally succeeded in separating their education from its ideological objectives and implications and chose what they needed according to their own goals and understandings.

As part of the friendship-based ideology of socialist internationalism, foreign students had the right of association, which in general is a form of political freedom, but they used their compatriot organizations mainly for socio-cultural activities. According to one of the respondents, the purposes of these organizations were *"to foster the interest of the people. We talk of our cultural interest and national identity and our aspiration for our nations, it was friendly and non-political organization"* (06_B.O.). As of 1967, there were 67 compatriot organizations in Bulgaria (if there were at least three students from the same country, the students were entitled to an association). There was a Friendship Club at the Students' Home and Friendship Councils at the higher education institutions.

But was it possible for foreign students to express an opinion different from the dominant Communist Party vision of Bulgarian society? Here the empirical experience of students differed. Their reactions ranged from acceptance and neglect (as in the case of 10_G.A.) to meaningful discussion with the lecturers on scientific communism and the history of the BCP or reticence to discuss the advantages and disadvantages of socialism with Bulgarian citizens because of the impossibility to make comparisons with African societies: *"They [the Bulgarians] are not very happy, there are two kinds – those who are pro-communist, those who are against and I am like a neutral electron and I cannot say 'he is right, the other is wrong'. It's just, for me, there's a big difference to where I come from"* (14_C.A.).

In fact, the state social arrangements provided opportunities for some African students to be educated in parallel with ideological limitations which our interviewees tried to accept, adapt to, or ignore in order to use their education without its ideological burden. Here it is important to highlight that the social (political) arrangements at that time used education to achieve much more idealistic goals such as thankfulness, love for the Bulgarian country, and devotion to the political system. In most of the conversations with respondents, we could understand that the feelings of thankfulness to their teachers (they remember their names) and love for the Bulgarian country are still alive. But the criteria for selecting students were mainly political/economical and not very transparent.

Socio-economic opportunities without transparency guarantees

The range of socio-economic opportunities available to African students is vast. From scholarships from a variety of providers (the Bulgarian government, national and international political organizations, African governments, etc.) to free access to cultural and sporting activities, "free medical care and free accommodation in student dormitories," and "nutrition in student canteens upon payment of significantly reduced prices" (CSA, f. 763, in. 2, a. f. 39), everything was organized to ensure good conditions for study, living, and entertainment for both Bulgarian and foreign students.

Comparing the economic and social state of their own countries to the conditions of their studies in Bulgaria, students appreciated the opportunities offered by the Bulgarian state:

> *And I lived, to tell you frankly, it was very much better than what I lived in my country. You know, back then to have 3 or 4 canteens for student meals in the dormitory, back then in African countries that are on the path of communism, they didn't have such infrastructures. Now for studying, I can tell you that I couldn't buy books in [my] country because they were all French, expensive, the*

> *libraries don't have the number of books. Whereas in Sofia there were libraries and no matter where you come from, you can sit down to read [..] Because if I could go to the university in [home country], I wouldn't come here. If I had a scholarship, to eat, to live in a dormitory, I wouldn't come there (14_C.A.).*

However, conditions were not the same for all students. Differences arose both from the African students' countries of origin and from the Bulgarian state itself. Starting from the late 1960s to early 1970s, the Bulgarian state introduced paid tuition for foreign students (CSA, f. 1,244/1, in. 7,006, a. f. 315, p. 51–52), effectively creating a double financial standard in higher education which affected the educational rights, facilities, standards, and, hence, capabilities of the students. Some of the students who received additional money in dollars from their home country as well as other private sources appreciated having their own financial means while studying, which generally differentiated them from most scholarship holders (scholarships only from the Bulgarian government or only from the respective African country).

> *I get money from [my country], I get dollars every year at the embassy there… then we found out — we didn't know, so there are people who are here through some women's organizations, or we found out there were some from the central committee, I didn't even know there was a communist party in [our country], then here I found out there were. I don't know about them, but for me, I was taking money from the government, the embassy was paying and therefore some more money in leva [the Bulgarian currency]. There was money, you know, they paid then… (12_T.B.).*

> *Very good experience I had, very good. Because we had everything on a plate of gold. We were given stipend for a student, we had a very, very good cafeteria, [..], we had accommodation, everything was just fine (06_B.O.).*

> *Nobody was prevented from having extra money, you will get a stipend from the government. But if you've got some extra money, it's okay. You can supplement to our living there. So this, that was good. Nobody was prevented from doing that (04_D.F.).*

The different economic regimes in which African students found themselves determined the possibilities and limits of their educational choices. As written in the policy documents: *"Young people admitted to the IFS pursue a course of study determined by their sending country or organization and, when they come at their own request, according to their wishes"* (CSA, f. 763, in. 2, a. e. 39, p. 40). Thus, the Bulgarian educational policy toward African students, which differentiated students according to different criteria (educational, political, economic) effectively created inequalities between them, as well as different opportunities and limitations. Those who paid for their education or came to the ASSSM of the BCP could choose where (in which city or university) and what (field) to study, while the rest had to choose only among the opportunities negotiated each year under bilateral agreements.

Even though these bilateral agreements ensured enormous benefits for the students (1 year language learning +5 years higher education), they provided them with low-cost dormitories and canteens, free libraries, traveling in the host country and abroad, etc. Another aspect of education policy toward foreign students in Bulgaria must also be emphasized, namely the creation of a social environment that would

"make foreign students true friends of our country, of socialist society" (CSA, f. 763, in. 1, a. f. 11, p. 147). Following this goal, the IFS organized free visits to theater, opera, and ballet productions, excursions in the country, summer and winter camps, sports activities, celebrations of national holidays of individual countries and of Bulgarian holidays, and meetings with students and labor collectives. These social and cultural aspects of Bulgarian educational policy, as well as the friendships created, were positively appreciated by the African students. *"All African countries participated in football championships. It was organized by the Bulgarian state. It was a very big social event, which we definitely enjoyed very much"* (01_K.M.).

All these conditions allowed the students to study without the necessity to work in an atmosphere of cooperation and friendship which, in retrospect, underlines the importance of concerted efforts to create infrastructures conducive to individual development and the construction of inclusive social relationships.

What remains problematic is the way in which future African students were selected. A cross-check of the official selection rules and procedures and the testimonies of respondents clearly shows that the decision as to who could and who could not participate in the educational programs for foreign students remained in the scope of social and political arrangements at national and supranational level without any transparency guarantees. Each year the rules, criteria, and requirements for the admission and education of foreign students in Bulgaria were described in regulations and ordinances sent to all relevant institutions in Bulgaria and abroad (the Bulgarian embassy in the respective country, ministries of education, political or social organizations in the respective country, partners of Bulgarian institutions). In general terms, they boiled down to the following:

> *The requirements for students are that they must have completed secondary education and be no older than 35 years, without distinction of nationality, race, gender or religion. Students on scholarship from the institute are not allowed to hold any permanent paid position during their studies. Every student admitted to the People's Republic of Bulgaria, on his arrival in our country, is to sign a declaration that the student has no right to change the course of study for which he has been admitted and to make no claim as to the university town in which he will study after completing the preparatory course of the Institute. They will not claim for travel to other countries by private means except for their home country once a year when they will pay their ticket with convertible currency. He shall not be allowed to continue his studies in an institution of higher learning in case his annual average in the special subjects is less than good/3.50/ (CSA, F.763, in. 2, a. f. 4, p.50).*

Over the years, however, many exceptions with uncompleted criteria for access to education appeared in the selection process of African students, as identified by the Bulgarian institutions themselves: "It is noteworthy that the applicants presented, with few exceptions, have incomplete secondary education, and those of them who have a diploma do not meet the requirements for studying at a higher education institution" (letter of Mem. Rector Dinev, IFS to the Central Committee of the Communist Party, Department of Foreign Policy and International Relations, No. 169/7.04.1969, CSA, f. 763, in. 1, a. f. 9, p. 116). As stated in another document of the IFS, "[..] in some cases, those sent as 'prospective students' had not completed secondary and sometimes primary education, or had completed secondary education

without the right to continue their studies in higher education due to failure to pass examinations or credits required under the respective educational system" (CSA, f. 763, in. 1, a. f. 9).

Uncovering the mechanisms of selection that would shed light on the causes of such discrepancies requires a separate study. Our previous research has shown class background and political orientation as key criteria in the selection of prospective students from Africa, Asia, and Latin America (Kachakova and Koleva, 2022). To the extent that all Comecon countries, including Bulgaria, primarily supported the newly liberated African countries with socialist-oriented governments and national liberation movements, the selection procedures favored students who were (or pretended to be) followers of the socialistic idea instead of those with the highest achievements, which was in contradiction with the basic tenet of the socialist educational system. At some point the social arrangements directed efforts to establish "friendship" with the political elite in African countries, not according to the students' educational needs or results. At the intersection of bilateral interests of cooperation in the field of education, the training of specialists turns out to have been subordinated to political goals — exporting the socialist social model (from Bulgaria) to African countries and ensuring the independent development of newly liberated African states. The introduction in the 1970s of paid tuition for foreign students in Bulgaria and the provision of raw materials to Bulgaria in exchange for the admission of students from some African countries also linked education to economic goals. Therefore, with a change in the political model and the resulting new political and economic priorities of individual countries, education as a tool for achieving non-educational goals loses its potential to be a driving force for social development and prosperity within the whole society. On the side of the individual, however, its value beyond the political, ideological, and economic contingencies of context besides the goals pursued by political actors (states) stands out. It supports the second hypothesis that the distribution of educational opportunities depends more on social arrangements at state and global level than on individual agency; once accessed, education has a powerful impact on the individual and increases his or her capabilities to rework the available conditions.

Following Sen's dimensions of freedom, we can see how the lack of transparency in social and political arrangements could be at the root of both the lack of individual freedoms and the use of deficits to extend freedoms. In both cases, what needs to be questioned is the social justice behind these arrangements. Although the socialist system had its deficits in terms of political freedoms and transparency guarantees, it did provide valuable access to education (economic facilities and social opportunities) for thousands of African students which was not available (or was, but at very high prices) in their own countries. The interviews show that African students managed to cope and circumvent or minimize some of the restrictions and lack of freedom in the system and developed according to their own expectations. In the next section we show through their professional pathways that the education received in Bulgaria was a powerful factor for individual conversion to the available conditions.

On the eve of graduation and afterwards: rearrangements and new "alternative functioning combinations" in the changing world

Under the bilateral agreements, African students' home countries were to cover their travel costs (arrival in Bulgaria, one-time return to

the home country during the period of study, return to the home country after the completion of studies) and provide the conditions for internships (in some majors) and jobs for graduates. Yet over the years, for both economic and political reasons, African countries began to stop respecting the clauses of these agreements. This called into question the sustainable professional development of African specialists when such conditions were not assured. In some countries after 1986, the state stopped providing these internships and hiring because of an oversaturated state sector.

> *Back then almost all countries had as a rule when you graduated, and this was in the contract with all the socialist countries, you had to go back to your country to apply what you had studied for two years. However, there came a time when the countries no longer had the strength to absorb all the cadres coming home. I took advantage of that to go directly, as they say, I took the elevator instead of going up the stairs (20_M.D.).*

In other countries, some people would skip these internships and try to find a job abroad, but they knew that later they could not hold a governmental position in their country: "You cannot work in any public establishment without your national youth service certificates" (06_B.O.). In some cases, changes in the political situation in their home country additionally affected respondents with more serious problems such as non-recognition of their diplomas or political arrests:

> *[…] after 1990 if you have some diploma from Bulgaria, you just go and study your internship, but this time around because of the changes in Bulgaria and they are going to the western style we don't recognize your certificate. So it was the most difficult for me situation, I had to write exams, so that I will prove that it is my certificate, that I'm (allowed) to practice in [my country] (10_A.G.).*

> *Before I came to Bulgaria, I had a job […] in a government department and I went back there to continue working there. They were worried about something there, they didn't exactly tell me the problem, but… I, however, knew they were worried and didn't want to take me because they wondered if I was qualified… (05_D.M.).*

> *I had a political problem then. My father was involved in…, so when I was coming back, I was arrested (06_B.O.).*

The political and economic changes following the collapse of the socialist bloc in 1989–1991 profoundly modified the educational policies of the former socialist countries with regard to Africa. Training programs in solidarity with developing countries fell off the agenda and remained without funding or the political will to continue them. New social arrangements replaced them, appealing for more individual freedoms and less state participation, which limited capabilities and created space for new deficits. Subsequent generations missed the previous opportunities for education in the Eastern bloc, insofar as access to education became a question of material assets. Moving toward liberal democracy and a capitalist economy, former socialist countries abandoned their commitment to African countries despite the human, material, and financial resources invested in the training of foreign students for more than 30 years. These changes led to institutional oblivion and the squandering of social capital accumulated over these

decades (networks of contacts with professionals trained in Bulgaria and scattered around the world). Not only have there been no attempts at political reckoning (instead of the complete abandonment of cooperation with Africa, especially in the decade after 1989, reorientation toward Western alliances and collaborations, etc.), there are also no scientific analyses of the results of these policies, and all traces of African students trained in Bulgaria have been lost (Koleva, 2020).

Attempts by Africans who graduated in Bulgaria to maintain contact with the host country have also ended in failure:

> *I had a classmate who became a minister. I suggested to him that we develop trade between Bulgaria and [respondent's county]. He in turn told me that since I was in Bulgaria every year, to tell about it. I have told many people about it… but many people do not answer me. They don't answer your e-mails at all, or… They have no interest. They just have no interest (20_M.D.).*

The political changes affected not only Eastern and Western Europe but also African countries. People educated in Eastern Europe found it harder to find employment and sometimes remained unemployed for years: "There is no work. Did you know that I found a job only after 4 years, only in 2000, and my wife — in 1998, after two?" (14_C.A.). Others had to change jobs:

> *Yeah, things before I went to Bulgaria, I had a job and so after I came back it was in a government department and I went back there to continue working there. Something there bothered them… I knew however that they were worried and didn't want to take me because they wondered if I was qualified… qualified… ["And did you prove that?"] Well, they didn't give me a chance, because they kept me waiting, so I had to look for another job in a government institution. Yeah, so this is the job I have even up to this day. I started as a junior officer and as a planner (05_D.M.).*

Even though it was hard to find a job and to develop in their careers, the data from the interviews shows that most of the respondents managed to achieve better "alternative functioning combinations" (Sen, 2000, p. 75) due to the education they received:

- 17 out of 19 work in their field (3 of them are researchers, 4 are medical doctors, and 2 of them have their own practice, 2 are teachers, 2 have a high position in public administration, 1 has his own law office, and the others work for private enterprises);
- 8 of 19 have participated in different forms of lifelong learning (3 have a medical degree, 3 hold PhDs, and 2 have other qualifications);
- 4 of 19 live and work in Western Europe, 1 in Bulgaria, and the rest in different African countries;

All of them are thankful for having had the opportunity to study in Bulgaria, and they value the provided conditions which are rarely if ever met even nowadays.

Some of the success stories shared here underscore the pivotal role of the education for the respondents in shaping their personal and career development:

> *Now I can create anything in this field. That's my pride, thanks to my education in Bulgaria (03_A.L.).*

I rode through the ranks and now I'm the Director – that's the highest position in the department (05_D.M.).

I worked with international organizations like … and today with the WHO (World Health Organization) in… (10_G.A).

I have a private hospital in both cities (17_O.M.).

My diploma theatre staging was related to the events in Bulgaria. [..] my play [..] was very successful. We had invited political figures from different countries. I think the play ran for two months… (19_A.).

The successful professional realization (despite vicissitudes, difficulties, and temporary unemployment) among African graduates in their own countries, in other African countries, or in Western Europe and their own self-assessment unequivocally confirm the role of education for the individual. These individuals' reworking of circumstances, contingencies, and changed objective conditions that are indicated by their life trajectories was made possible mainly through higher education. It is proving to be a powerful factor for individual conversion of available conditions. The question remains as to how education can ensure the synchronization of human development and social development, a synchronic development between individual freedoms and collective empowerment, and how individual freedoms might make social arrangements more appropriate and effective (Sen, 2000, p. 31). A possible answer to this question is found in Margaret Archer's concept of corporate agency and collective capacity. It is this agency that "invents new rules for new games which contain more roles in which Social Actors can be themselves [..]. What [the person] gains (thanks to the regrouping of Agents) is the collective capacity to refashion social positions, thus ultimately making society as well as himself" (Archer, 2004, p. 287). Thus, if the usual solution to societal problems is sought via policy change, it will only be effective if policies consider individuals not as "objects of roles" or "passive role-takers" but as "active role-takers," i.e., as "a source of role change."

The experience of one of the interviewees very well illustrates the effect of corporate agency and collective capacity:

So, when we came back here from Bulgaria, we were few compared to those who came back from the [Soviet] Union. However, the training was almost at the same level. Because when we arrived in [..], there was no work for us. Then we were unemployed. However, I, as a doctor now, I was also able with a, I should say, a friend who was in the government, to gather all those who had a doctorate, and then I told him that our place was in the university, in research, in training in the university. Then we did a survey and we got that most had five years' training in the university when we had at least eight years. The minister at the time — he's still active today — commended us. I congratulate him very much because he called us. Instead of making a riot around the country, he said, "Give a project, something", and that's what we did.

We gave the project, he was really very surprised how we could do that. And all in French, nobody spoke Bulgarian and so on, neither

Polish, nor Hungarian, nor Romanian. And in French we explained everything we wanted to do. In short, everybody, absolutely everybody who had that degree was admitted to university (20_M.D.).

Collective agency here could be seen as a possible bridge between individual agency and the social arrangements which are needed for effective social change in societies.

Discussion

Seen through the prism of Sen's capability approach, the educational and professional trajectories of Africans who studied in Bulgaria during the period 1960–1990 show the range of opportunities open to an individual thanks to bilateral agreements in the field of education. Despite limited freedoms in terms of choice of major, country, and university, thousands of young people from African countries received a chance at an education they would not have had in their own countries. The respondents' stories reveal the power of state policies to ensure broad access to education and to develop individual capabilities for study, professional growth, and work. Education became their most important asset in the geopolitical reconfiguration of the world that occurred after the end of the Cold War and the subsequent radical transformations in both Bulgarian and African societies. In a situation of accumulating deficits (Bulgaria's unilateral termination of bilateral agreements on cooperation in the field of education, the refusal or inability of African countries to provide jobs to returning graduates, an absence of guarantees for the lives of students identified as adversaries in the change of political regimes, administrative and legal obstacles to remaining in Bulgaria), education is still their most powerful resource, acting as the most effective conversion factor for professional realization and the achievement of personal well-being.

The successful professional realization (despite vicissitudes, difficulties, and temporary unemployment) among African graduates in their own countries, in other African countries, or in Western Europe and their own self-assessment unequivocally confirm the role of education for the individual and its value beyond the political, ideological, and economic contingencies of the context pursued by political subjects (states).

Following Sen's approach for evaluating effective freedoms through education, we also apply it as a valuable resource for a critical analysis of the social arrangements and institutions responsible for defining educational goals. In the context of the Cold War, cooperation in the field of education between the former socialist bloc and the newly independent African countries, or those on the road to independence from colonialism, was based on mutual interests. By preparing future specialists for these newly independent states, the countries of Eastern Europe were helping them to fill the void left by the departure of the metropolitan cadres while exporting their economic and political model of society. By sending students to the countries of Eastern Europe, African countries remedied the shortage of specialists without definitively severing relations with their former metropoles. As Katsakioris shows, independent African states were not the passive recipients of aid but active players on the geopolitical stage (2007, 2017, 2019). There is no doubt that the bilateral agreements between African countries and former socialist states enabled a considerable number of young Africans from modest families, with no economic resources and no educational heritage, to

gain free access to high-level vocational and higher education under dignified and favorable conditions without economic constraints.

Although the capability approach overemphasizes the rationality of actors and does not account for the interdependence of humans (e.g., Iversen, 2003; Zimmermann, 2006; Dean, 2009; Deneulin and McGregor, 2010; Egdell and Robertson, 2021), this analytical instrument has succeeded in giving a sociological perspective of the relationship between individuals and social agreements (social, political, and educational structures) in different social contexts (before and after the collapse of the Eastern bloc). In this sense, we agree with Owens et al. that "the capability approach can provide a means of understanding the (unequal) distribution of opportunities across society, helping to explain why some people, as individuals or groups, appear to enjoy opportunities that others do not. In so doing, it can also provide a means of evaluating and critiquing the structural conditions (including, for instance, policies, practices and institutional arrangements) that underpin the distribution of agency" (Owens et al., 2023, p. 5).

The study of the educational and occupational trajectories of African citizens who graduated from higher education institutions in Bulgaria through the prism of Sen's capability approach shows the adaptability of this approach to qualitative data, to a particular field like education, and to different social or historical contexts and different political regimes. The analysis has highlighted some aspects of capabilities, the consideration of which could enrich the conceptual apparatus of the capability approach and broaden its applicability.

First, although various authors speak of corrosive disadvantages (Wolf and De-Shalit, 2007), of the absence of opportunities to apply already achieved functionings (Nussbaum, 2012), and of deficits, this approach views capability through opportunities rather than through various deficits that an individual encounters in his or her life. The transformation of environmental deficits (mismanagement, disarrangement, irregularities) into opportunities and the role of different capabilities in this transformation could show not only the amplitude of agency as freedom but also the weaknesses of different policies.

Second, even though the capability approach emphasizes the role of the individual and his or her agency for personal development, we have used it to emphasize the role (or in some way the obligation) of state policy and social agreements in ensuring access to education and the balance between human and social development. Namely by means of the capability approach, the manifestations and the tensions of particular social arrangements or individual agency could be described more deeply. As McLean states, "[U] niversity education cannot do everything: graduates might expand their capabilities as students, but they need conditions in employment and as citizens to convert capabilities to achieved functionings" (McLean, 2018, p. 121). Therefore, the capability approach has proved to be an effective tool for assessing both individual freedoms and social arrangements, though this depends on how researchers use it.

Third, by focusing on the individual and his or her capabilities, the capability approach does not address (though it could) the issue of collective governance, collective agency, or shared values, which are all very important for renewing the existing social contract and for future social development.

In other words, if various forms of the capability approach call for considering the person as an end and not as a means, it is worth reconsidering social arrangements where education, as an integral part of approaches based on human rights and freedoms, is understood in terms of the harmonious achievement of individual ends through collective arrangements distributed with the greatest possible justice, not as a means favoring political and economic domination.

Conclusion

Applying the capability approach to study the (un) freedoms and the choices of African students trained in Bulgaria during 1960–1990, we have proved that education is a valuable resource for individuals' capability as well as an important conversion factor allowing the achievement of alternative functioning combinations within changing contexts.

Both the archives and testimonies of African graduates reveal that the problems begin when purely educational cooperation programs are transformed into an instrument for achieving economic objectives or a front for purely political objectives, in the case of Bulgaria, or when states renege on their own commitments, in the case of African countries. Such hidden rearrangements have repercussions on individuals, and the new conjunctures of circumstances show the variety of "alternative functioning combinations" achieved by individuals to expand their freedoms despite the shrinking or profound modification of social arrangements. At the societal level, however, individual freedoms expanded through education do not lead directly to better and more equal social development for everyone. Annual UNDP Reports on African countries (1990–2020) show that they still suffer from low levels of productivity and competitiveness, high levels of social inequalities, and brain drain to richer countries. Returning to the paradox from which we started, our targeted research on African graduates of the Bulgarian university system in the 1960s–1990s leads us to new questions. Why is ensuring access to education not a sufficient condition for human and social development? When does education lose its potential to be the driving force behind social development and prosperity for society as a whole? Should we accept education only as a means, a factor, and a goal (according to Sen), or should we appeal for it to be more, a state, global, or even human responsibility, aspiration, and value–one which would lead to better and fairer social development for all nations and all people? To be able to answer them, we need to continue exploring the ways in which education might help to ensure the synchronization of individual freedom and collective empowerment and between human development and social development.

This research intends to call for further development of the capability approach to better understand the dynamic relationships between individuals and social structures, the making of conversions and alternative combinations, and their influences on the functioning of society.

Data availability statement

The original contributions presented in the study are included in the article/supplementary material, further inquiries can be directed to the corresponding author.

Ethics statement

Ethical approval was not required for the study involving human participants in accordance with the local legislation and institutional requirements. Written informed consent was not required from the

individual(s) for participation in the study or for the publication of any potentially identifiable images or data included in the article, in accordance with local legislation and institutional requirements. Due to the lack of direct contact between researchers and respondents, the latter did not complete a written informed consent form. Prior to each online interview, each respondent confirmed their consent to participate in the interview, to have the conversation recorded, and to have the interview information anonymized for research purposes.

Author contributions

VK: Investigation, Writing – original draft, Conceptualization, Resources, Writing – review & editing, Methodology. SK: Conceptualization, Methodology, Supervision, Writing – original draft, Writing – review & editing, Investigation, Resources.

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Conflict of interest

The authors declare that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

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