

POVERTY AND FREEDOM

GUNTER GRAF and GOTTFRIED SCHWEIGER

Abstract: The capability approach, which is closely connected to the works of Amartya Sen and Martha Nussbaum, is one possible theoretical framework that could be used to answer the question as to why poverty is a problem from a moral point of view. In this paper we will focus on the normative philosophical capability approach rather than the social scientific and descriptive perspective. We will show that the approach characterizes poverty mainly as a limitation of freedom and that it is precisely this aspect, from its point of view, that makes poverty morally significant. This insight shifts the discussion away from questions regarding specific capabilities or lists of them – questions treated extensively in the literature – to the more general level of what constitutes the normative core of the capability approach. But as we will also discuss and argue, the role of freedom alone does not give us a complete picture of poverty but only presents us with one aspect relevant to evaluating it. A further aspect which we consider has not been adequately recognized and taken into account by most capability theorists is the experience of disrespect and humiliation, or to put it differently, a lack of recognition.

Keywords: poverty; capabilities; freedom; recognition.

Introduction

Poverty is a major social problem and due to its significant negative effects it has been treated by philosophers at great length. As yet, there is no shared understanding on what constitutes the ethical wrongness or injustice of poverty. The capability approach, which is closely connected to the work of Amartya Sen and Martha Nussbaum, is one possible theoretical framework that may be used to answer the question as to why poverty is a problem from a moral point of view. The capability approach is widely used in many different social scientific as well as philosophical examinations of poverty, but within this framework there are also questions regarding the assessment of poverty which need to be fleshed out. In this paper we will focus on the normative philosophical rather than the social scientific and descriptive perspective of the capability approach. We will show that it characterizes poverty mainly as the limitation of freedom and that it considers this aspect to be responsible for making poverty morally significant. This insight shifts the discussion away from questions regarding specific capabilities or lists of them – questions treated extensively in the literature – to the more general level of what lies at the heart of the capability approach and its

normative core. Sen has written about the absolute core of poverty, which goes beyond the mere inequality of having less than others, and we think that this core can be reconstructed as living a life in unfreedom (Sen 1983). Freedom, in this perspective, is the main and most important benchmark against which social conditions and the people's lives should be evaluated. It is this core value from which one can begin to deduce or otherwise develop distinguished capabilities which bring freedom in different variations into life and which contribute essentially to a person's well-being and her quality of life.¹ The moral harm of being poor is that poor people lack this freedom to live the lives they see fit and to realize the goals they have reasons to value. In this sense, freedom, as understood in the capability approach, is closely tied to autonomy, the capability to realize oneself and to determine one's own life. As we will also discuss and argue, however, is that the role of freedom alone does not give us the whole picture of the morally relevant aspects of poverty but only presents us with one element of its normative core. Another which we consider to be inadequately recognized and taken into account by most capability theorists, is the experience of disrespect and humiliation, or to put it differently, the lack of recognition. Accordingly, via the complementary perspective of the recognition approach, the moral harm of poverty is closely related to social exclusion and successful measures of poverty alleviation have to go together with inclusionary processes.

In the first section we will lay out the capability approach and discuss poverty as a form of capability deprivation. We focus on three key terms: capability, functioning, and agency, and show that in this approach poverty is characterized as a limitation of freedom, which is the main reason it is considered morally significant. In the second section we introduce the concept of recognition into our discussion and argue that it complements the capability theorist's view of poverty because it allows her to take into account dimensions of poverty that are related to the state of unfreedom but constitute their own forms of harm. Furthermore, a comprehensive theory of recognition can be used to address the basic social embeddedness of freedom in relations with others and how this is endangered by living in poverty. Hence, the importance of social inclusion is emphasized, which is in danger of being neglected in approaches to poverty that put individual freedom at the center of attention. One central insight obtained from our engagement with the two approaches to poverty is that normative questions have to be asked continually and made explicit, which may then serve as a tool for uncovering hidden assumptions within poverty research and poverty politics. Philosophy, therefore, can have a valuable critical function and help bring the core questions into the foreground.

Capability deprivation: the capability approach on poverty

¹ For further elaboration of the relationship between a person's capabilities and her quality of life, see e. g. (Nussbaum and Sen 1993; Comim, Qizilbash, and Alkire 2008)

Within the last 30 years, the capability approach has become one of the most influential theories in poverty research, the study of inequality and human development in general (Gasper 2004, Alkire/Comim/Qizilbash 2008, Robeyns 2011, Leßmann 2013). From its beginnings, Sen and Nussbaum, who have to be considered its main architects, engaged with these issues from a normative perspective. They both highlighted the deep entanglement of facts and values and the importance of explicitly recognizing ethical thinking in economics and other social sciences, which sometimes are considered as neutral and "value free" (Sen 1980, Sen 1987, Nussbaum/Sen 1993). It has now been developed into a distinct philosophical perspective on social justice (Sen 2009, Nussbaum 2006), even though there is still considerable disagreement about some of its assumptions, its scope and issues of justification. However, its central claim is clear: according to the approach, evaluations of societal arrangements, quality-of-life assessments and judgments about justice or development should primarily focus on people's capabilities, that is, on their actual opportunities to lead the lives they have reason to value (Sen 1999, p. 75; Nussbaum 2011, p. 20; see also Robeyns 2005, p. 94). In other words, the capability approach focuses on what people are effectively able to do and be, instead of on what they have or feel. This does not mean that income, happiness or commodities are not important in this perspective; they are, however, considered a means to an end and therefore of instrumental value only, while happiness is seen as one of a number of significant aspects of human life that cannot be taken as the only evaluative category.

For a better understanding of these claims, it is useful to take a closer look at three central terms as introduced by Sen (e.g. Sen 1992, pp. 39-42 and Sen 1999, pp. 74-76; see also Alkire 2002, pp. 4-11): (achieved) functionings, capabilities and agency. Functionings are the valuable activities and states that make up people's well-being - such as being healthy, having a good job, being adequately nourished or taking part in the life of the community. It is possible to differentiate between functionings as "the various things a person may value doing or being" (Sen 1999, p. 75) and achieved functionings as the particular beings or doings a person has realized at a given point in time. Capabilities, then, are understood as the various combinations of functionings (beings and doings) that are feasible for a person. They reflect the person's freedom to lead the kind of life he or she has reason to value. If a person has more capabilities, this means that he or she has more valuable options to choose from - put differently, more life paths are open to her. Capabilities depend on individual skills and dispositions, on the goods and resources a person possesses and also on the social environment that can enhance but also limit a person's freedom. Here it becomes clear that in the capability approach persons are characterized as active beings equipped with agency, and not as passive recipients of their environment. Following Sen, the notion of agency refers to a person's ability to pursue and realize goals that he or she values and has reason to value. Hence, an

agent is someone who acts deliberately according to her own values and objectives and tries to bring about change in her life and the wider social and political environment (Sen 1999, p. 19). The goals and objectives an agent pursues depend on her own conception of the good and might even jeopardize her own well-being (consider, for example, a human rights activist protesting in hazardous circumstances), an insight Sen used from the beginning to criticize orthodox economic approaches which see the person as a rational profit maximizer - a rational fool in Sen's words -, incapable of commitments and sympathy. In contrast to such individualistic and purely egoistic conceptions of the person, the capability approach stresses the social embeddedness of every individual and understands agents as shaping their own lives in cooperation and reciprocity with others (Nussbaum 2000, 72). Sen and Nussbaum acknowledge the importance of social groups and cultural factors in the life of every human being and recognize their enormous influence on the capabilities people enjoy. However, social and cultural aspects are never considered as intrinsically valuable, but are only taken into account insofar as they affect the opportunities and freedoms of individuals (see Drèze and Sen 2002, p. 6, and Nussbaum 2006, p. 216). Each person is considered as valuable, worthy of respect and a source of agency in her own right - an end in itself, who has a valid claim to develop and unfold her potential, as Nussbaum and Sen argue referring to different philosophical perspectives and traditions (Nussbaum 2000, 73).

What do these considerations mean for the understanding of poverty? First of all, it is clear that poverty is considered a multidimensional phenomenon that cannot be adequately characterized by reference to a single measure such as income (the standard measure of poverty) or happiness. A multitude of important beings and doings must be taken into account and many life dimensions must be considered in order to get to an adequate picture of an impoverished life. Furthermore, adequate poverty measures that are in line with the capability approach must be able to capture not only valuable functionings that have been achieved, but also a person's *freedom* to choose the kind of life she has reason to value. As shown above, the capabilities approach starts with the assumption that the freedom to lead a life according to one's own choices and values – which is conceptualized via a person's capabilities – is a basic ingredient of a flourishing human life. Being poor, in this perspective, does not only mean a lack of income or material goods but also being in a situation where basic freedoms, which are prerequisite for making choices one has reason to value, are crucially limited. As a consequence, poverty is defined as the deprivation of certain crucially important capabilities (Sen 1999, p. 87), which is tantamount to asserting that it must be understood as the limitation of freedom.

There is obviously a strong connection between one's material situation and the options and possibilities that are open to one, and economic deprivations often rob people of many basic freedoms. The freedoms to satisfy hunger, to achieve sufficient nutrition, to obtain remedies for

treatable illnesses, to be adequately clothed or sheltered, to enjoy clean water or sanitary facilities are generally associated with the economic situation of the respective person (Sen 1999, 4). However, unfreedoms and hence poverty can also be linked to a lack of public facilities, social care and to the political situation of a country. In a welfare-state e.g., where health care is available to all and a functioning public educational system is in place, income deprivation is a lower burden to meet than in countries where no such systems exist. Thus, a direct focus on substantive freedoms – or capabilities, in Sen's and Nussbaum's usage – in the description of poverty has clear advantages over an income perspective. Ultimately, it is their deprivation that counts, and since there are many variables, besides income, contributing to the expansion – or diminution – of capabilities, a direct focus on capabilities seems to be of advantage. The relationship between low income and capability deprivation varies between different communities, families and individuals (Sen 1999, pp. 87–90), and factors such as age, gender, social position, family situation or state of health affect the way goods or income can be converted into valuable functionings. Therefore, the capability perspective on poverty generates many insights ignored by the narrow equation of poverty with low income.

When thinking about freedom and its significance for evaluating poverty from the perspective of the capabilities approach, a further differentiation is appropriate: first, freedom embraces "both the processes that allow freedoms of actions and decisions, and the actual opportunities that people have, given their personal and social circumstances" (Sen 1999, 17). Poverty, understood as the deprivation of basic capabilities, is connected to both – generally closely interrelated – aspects of freedom. On the one hand, poor people have inadequate opportunities to achieve what they would minimally like to achieve. Still today many live in circumstances where there is a lack of even basic opportunities and preventable morbidity or involuntary starvation are common. On the other hand, poverty also means being in a situation where one is disadvantaged in taking part in the processes that shape one's life and the wider social environment. A lack of cultural and social capital (including basic education and other forms of knowledge) reduce the ways poor people can meaningfully and effectively participate in public discussions (Lister 2004). When it comes to planning their personal and family life, their knowledge of and perspectives on different options are also limited, as many empirical investigations indicate (Lewis 1998, Shropshire/Middleton 1999, Broussard/Jospeh 2009). The characterization of freedom in terms of processes as well as opportunities leads to another important point. A central aspect of the concept of freedom defended by Sen and Nussbaum lies in its positive dimension (Nussbaum 2011, 31-33, Sen 1999, 282-298). Freedom does not simply mean the absence of state actions in the life of a person or a group of persons, as is stressed by libertarians and neoliberal thinking; it also means putting people in a position where they can act actively and responsibly towards their own good and that of the society as a whole. Therefore "[...] the CA [...] directs government to think from the

start about what obstacles there are to full and effective empowerment for all citizens, and to devise measures that address these obstacles " (Nussbaum 2011, 32). The importance of free choice and individual responsibility, which is highly valued in the capability approach – and must be considered a theory in the liberal tradition of political philosophy – is contingent on personal, social and environmental conditions, as Sen powerfully argues:

"A child who is denied the opportunity of elementary schooling is [...] handicapped all through life (as a person unable to do certain basic things that rely on reading, writing and arithmetic). The adult who lacks the means of having medical treatment for an ailment from which she suffers is not only prey to preventable morbidity and possibly escapable mortality, but may also be denied the freedom to do various things-for herself and for others-that she may wish to do as a responsible human being. The bonded laborer born into semislavery, the subjugated girl child stifled by a repressive society, the helpless landless laborer without substantial means of earning an income are all deprived [...] in terms of the ability to lead responsible lives, which are contingent on having certain basic freedoms." (Sen 1999, 284)

Individuals should be seen as agents who actively shape their own lives. The capability approach is certainly an agent-oriented view, and in the end it judges societies according to the degree they allow people to live the lives they have reason to value (Sen 1999, 11). However, it also makes clear that this ideal of individual freedom is embedded in the wider social and cultural context and cannot be discussed without paying attention to the manifold aspects that form our lives without our deliberate decisions.

In summary, the capability approach claims that the availability of certain substantial freedoms is judged as the most important aspect of the life of any person. The freedoms, e.g. to live a long and healthy life, to take part in the life of the community, to receive a high quality education, to enjoy recreational activities or to seek employment on an equal basis with others, are commonly seen as basic and it is demanded that they are made available to everyone. Since poverty is essentially defined by the absence of such intrinsically valuable components of a good human life, it is clear that it is, by definition, a problem from a moral point of view, should it be avoidable. Furthermore, capability theorists argue that human beings have the potential to live flourishing, meaningful and active lives according to their own values and shaped by their conceptions of the good. Social arrangements are of instrumental value only, and they primarily have the function of providing conducive conditions for each and every person to develop their faculties and to help them attain the position of acting autonomously. If somebody is affected by poverty, her valuable choices are limited and her potential to realize her life plans is seriously restrained. In a situation of

serious capability deprivation, it is not possible to act as an autonomous agent, which is considered a serious harm and even a fundamental violation of the equal dignity of all human beings.

Adding insult to injury: recognition and poverty

So far we have reconstructed the capability approach and argued that the moral harm of poverty should be seen as the limitation of freedom. We would now like to add a different perspective, which in our opinion contributes further to this understanding of poverty; namely, that poverty is accompanied and strengthened by the experience of disrespect and humiliation. Poverty brings with it a lack of recognition and this has to be taken into account when evaluating poverty and exploring why and how it limits the freedoms of those affected. If this is not properly recognized, an essential condition of freedom and autonomy is missing.

The ethical and social dimensions of the experience of recognition have gained increasing attention over the last few years in work by thinkers such as Charles Taylor, Nancy Fraser or Axel Honneth (Caillé und Alain 2006). At the centre of this recognition-theoretical reasoning is the insight that recognition is not only a pleasant experience but that there is an ethical claim to be recognized, since without it humans are not able to fully develop and sustain their identity, personality and self. As Honneth has developed at length in his most recent work, recognition is the social condition of freedom and self-realization and therefore the goal should be to establish and secure social relations in which the experience of recognition is possible and people are protected from the experience of moral harms like disrespect and humiliation (Honneth 1996; Honneth 2011). This can be called a recognition-theoretical approach to social justice and the evaluation of all different social phenomena, processes and relations in that it focuses on people's actual experiences of being recognized in different dimensions of their personhood, e.g. as being vulnerable beings, as autonomous persons, as citizens or as valuable members of society. Two facets of this discussion are important in relation to the goals of this paper. First, recognition and freedom are closely bound together, and second, disrespect and humiliation are experiences of moral significance that can have a lasting and devastating impact. To put it differently: it is not only what people are able to do that is important but also that they are recognized for what they do and are not disrespected for what they cannot do.

The first perspective is tied to the anthropological claim that recognition is an important and essential condition for freedom and enables people to become autonomous beings. Humans do not only crave recognition and seek to be recognized for various dimensions of their personhood, but they also need to experience it in order to develop proper self-esteem and self-respect. Humans need to be cared for and recognized for their individuality in close personal relations and respected for

being reasoning and morally responsible. Without these relations of recognition, the development of positive self-relations and identity is distorted or even impossible. Today there is plenty of psychological and social scientific knowledge that supports this important role of recognition (O'Neill und Smith 2012) and this can also provide insights into the lasting effects of growing up without proper care, as is the case for many poor children. Recognition translates into resilience factors. Likewise, the ongoing experience of denigration and humiliation destroys basic self-confidence and makes it nearly impossible to develop an understanding of oneself as a valuable being, able to pursue her own goals (Hutchinson, Abrams, und Christian 2007).

These anthropological considerations cannot be detached from the social theoretical claim that is concerned with the conditions of actually realizing freedom and distinguishing different social spheres of freedom. The core idea of autonomy, to realize oneself and the goals one values and to live the life one chooses to live, depends on others as well as social relations of support. These relations are shaped differently across and within societies, but they share the feature of providing institutions that protect the autonomy of their members and enable them to actually do things. Honneth describes the family, citizenship and markets as the most important institutions in which one can experience and realize autonomy based on the mutual recognition of the members within each of these institutions. While the family is closely connected to the afore-mentioned recognition of being a non-exchangeable individual, citizenship protects and brings about the principle understanding that all humans as equal, whereas the market is centered around the idea of a desert, that each and every member should receive according to his or her efforts and achievements. Honneth writes about the interaction of recognition and its effects:

"To this extent, every human subject depends essentially on a context of forms of social interaction governed by normative principles of mutual recognition; and the disappearance of such relations of recognition results in experiences of disrespect or humiliation that cannot fail to have damaging consequences for the individual's identity-formation. But this tight intermeshing of recognition and socialization gives rise in the opposite direction to an appropriate concept of society, which allows us to see social integration as a process of inclusion through stable forms of recognition." (Honneth 2003, 173)

From these anthropological and social theoretical considerations we will now shift to the second perspective of the recognition approach relevant to our discussion. It is an ethical one, and it brings a new dimension into our claim that the evaluation of poverty is concerned with it being a limitation of freedom, namely, that this limitation is accompanied by experiences of disrespect and humiliation. Poverty is a condition of vulnerability, in that it makes people dependent on others,

robs them of the necessary resources to protect themselves and is itself experienced as a personal failure (Stewart et al. 2009). This vulnerability is not only the result of the material hardship that comes with poverty but also of the social relations in which it is experienced and the experiences poor people have while dealing with their condition: the way it is labeled and worded in the press, negative experiences with social service workers, friends and former colleagues, feelings of worthlessness, despair, isolation and loneliness, and so on. The poverty induced inability to do what one wants to do, to realize the capabilities one values is thus not only a limitation of freedom, but it is often experienced as shameful, denigrating and humiliating (Jo 2013). These experiences are further intensified in contexts in which poverty is labeled as the responsibility of the poor themselves, who are considered to deserve their poverty. The inner relation of unanswered claims for recognition and material hardship that are bound together in poverty can cause a downward spiral and lead to processes of social exclusion and withdrawal, triggered not only by others but also in order to protect oneself from these negative experiences. Poverty has been studied in depth as having negative effects on the self-understanding of poor people who also become unable to choose and realize valuable goals and adapt to their situations because they lack the recognition and support they need from others.

The close relationship between denigration and poverty also finds strong support in research on the effects of unemployment, which shows that the hardship of unemployment is not only, and perhaps not even primarily, rooted in the loss of income but in the loss of what Marie Jahoda classically labeled as the latent functions of employment, of which the important ones are the security of status and self-respect through the experience of recognition within and for one's work (Jahoda 1982). The fruitfulness of Jahoda's theory has been extensively discussed and recently supported by new research and may serve as further social-psychological underpinning of the recognition approach (Paul und Moser 2009).

Only if the dimension of recognition is taken into account can we fully understand the moral harm of poverty (Schweiger 2013). It is a social condition of unfreedom and disrespect that does not allow people to realize the goals they have reasons to value, but rather lets them experience the humiliation of being poor. They are excluded from social relations that would allow them undistorted recognition and they therefore lack the necessary and valuable conditions of self-respect. But does this mean including merely subjective dimensions in the evaluation of poverty, perhaps even reintroducing utilitarian happiness into the capability approach? It does not: first, the experience of recognition or disrespect is not meant to override the importance of what people can actually do and their basic capabilities in evaluating poverty. It would be a shortcoming to reduce poverty to the feeling of being disrespected or humiliated, but it would be just as ignorant to deny that such feelings are an essential negative part of the harm caused by being poor. Including the

perspective of recognition is a way of critically dealing with this subjective emotional dimension and giving it its due place. Second, recognition also plays an important role in the realization of capabilities and functionings. If we do not only want to ask what people can and cannot do but also why they can and cannot do them, recognition certainly plays an important role.² This again suggests that there are other important factors necessary to the realization of one's capabilities, which there certainly are. If freedom and autonomy are at the centre of the social concern of the capability approach, its evaluation and critique of poverty, it can and should incorporate the dimension of recognition as an important condition for realizing them through positive relations to others.

Conclusions

Our discussion on the capability approach has shown that it characterizes poverty as a limitation of freedom and that it is this aspect that makes poverty morally significant from its perspective. But a narrow concentration on freedom is neither able to grasp the structural causes of poverty nor does it reveal the whole spectrum of the dimensions of exclusion and suffering. Therefore we have suggested explicitly including the dimension of recognition in order to provide a more comprehensive understanding of the moral harm of poverty. Unfreedom and disrespect are two central moral categories for evaluating poverty and although we are confident that they allow us to understand poverty better than by just looking at resources and income we do not claim that they are exhaustive.

In the conclusion of our article we now want to mention two further problems that we had to leave unresolved and that hover over a capability theoretical critique of poverty such as ours. Both are rooted in the problem of how to distinguish true and undistorted freedom from its false understandings, which also dominate the political and societal discourse about poverty. The first problem concerns "adaptive preferences", which enable people to adapt not only their actions but also their minds, hopes, fears and subjective well-being to the social conditions in which they live (Comim/Teschl 2005). Although considerations regarding adaptive preferences occur regularly in the work of Sen and Nussbaum and both of them seem to draw on the idea of an objective, third-person perspective to evaluate such conditions as unfreedom even if they are experienced in a different way, they have never given clear criteria that distinguish undistorted and authentic choices from distorted and conditioned ones. Are the health problems that an adult working class citizen experiences as a result of bad eating habits the consequence of authentic and "free" choices? Are the life choices of people who had traumatic childhoods always suspect and in need of supervision?

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The second and related problem concerns the public discourse about poverty. There is a long tradition of speaking of the so-called deserving poor, meaning that people are poor, maybe not by choice, but because of the choices they made. Can we really understand poverty as being the result of freedom understood in this way, as the result of making free, yet wrong, choices? Focusing on freedom seems to be in danger of giving arguments to those who shift the responsibility onto poor people themselves and misidentify them as lazy, underachievers, and the deserving poor.

Both adaptive preferences and the discourse on being poor by choice show that there is a need to develop a more comprehensive understanding of the social conditions of freedom itself and its distortions, one that is so far missing in the capability approach. The research on recognition offers an important and complementary account, revealing that freedom must always be understood in relation to others, and that central freedoms can only be achieved and secured by considering that they depend on others. Every characterization of freedom, particularly in the context of poverty research, must pay attention to the experience of recognition or disrespect, our relations to significant others and the wider social contexts we live in.

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International Research Center Salzburg
Mönchsberg 2a

Salzburg 5020
Austria
E-mail: ggraf@ifz-salzburg.at

address

E-mail: gottfried.schweiger@sbg.ac.at