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Intersecting inequalities: theoretical challenges and implications for research on poverty and social exclusion in Europe

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i) to advance the knowledge base that underpins the formulation and implementation of relevant policies in Europe with the aim of exercising the EU social rights as an integral part of EU citizenship and promoting upward convergence, and

ii) to engage with relevant communities, stakeholders and practitioners in the research with a view to supporting social protection policies in Europe. Contributions to a dialogue about these results can be made through the [project website (euroship-research.eu)](euroship-research.eu), or by following us on Twitter: @EUROSHIP_EU.

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Abstract:

The EU's commitment to foster social cohesion across Europe relies on its ability to fully understand social inequalities. Through this understanding it will be possible to target the necessary groups, social classes, territories, countries that have been systematically left behind and/or those who are vulnerable to future shocks and stressors. Understanding inequality is even more urgent now as our economies and, more in general, our way of life is challenged by massive, interlinked shocks: the COVID-19 pandemic, the war in Ukraine, the rise of food and energy prices, the consequences of climate change and the costs of transition. These events have dramatically clarified that the impact of different type of crises is heterogeneous inflicting different costs to different group of persons depending on variables such as gender, age, ethnicity, disability, level of education and place where they live. Intersectionality enables hidden injustices to be disclosed by providing an understanding of how the different sources of discrimination interact with each other. It links the lived experience of individuals to the wider patterns of power relations and thus affecting EU social citizenship.

In this paper we explore how these set the ground for the existence of intersecting inequalities. Contrary to vertical inequality which refers to inequality between individuals according to monetary metrics, and differently from horizontal inequalities which accounts for the existence of multidimensional inequalities between socially defined groups. Intersecting inequalities consider simultaneously the intersection between different disadvantaged social categories and the intersection between different dimensions of exclusion. We explore this concept through the analytical lens of the capability approach, which relies on conversion factors, individual and collective agency and capabilities as conceptual tools. After illustrating the main theoretical challenges related to intersecting inequalities and social citizenship, the paper sets out the research implications. Finally, the article calls for adopting at EU level an intersectional approach both in terms of analysing gaps in social citizenship and in terms of policymaking.

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1. Introduction

EU's commitment to foster social cohesion relies on its capacity to fully comprehend social inequalities so that it will be possible to target all the groups, social classes, territories, countries that are systematically left behind and\or are more vulnerable to shocks and stressors. This paper, using the capability approach and the intersecting inequalities framework, aims to disclose hidden injustices by providing an understanding of how the different sources of discrimination interact with each other affecting power relations and EU social citizenship.

The policy makers concern towards social inequalities has raised dramatically in recent years in the EU but also globally. In the two decades before the pandemic, the gap between "Global North" and "Global South" has narrowed mainly because of the considerable growth experienced by emerging countries (Milanovic, 2016). This reduction in cross-country inequality at the global level can be consistently measured both by using monetary metrics and by using multidimensional approaches (e.g. increase in education enrolment ratio, life expectancy etc.) (World Bank 2014; Alkire and Roche, 2013; UN, 2014). Global South countries' overall good performance in achieving the Millennium Development Goals is coherent with this narrative (Klasen, 2009; UNDP, 2013). However, when analysing inequality *within* countries, with few notable exceptions, the story is far less successful (UN, 2012). In his seminal works on global inequality, Milanovic (2016) clearly showed that globalisation has led to a sizeable reallocation of income and wealth and that the Global North low-middle income class can be identified as the main looser of this game. This has raised serious concerns about the social sustainability and social citizenship of the current development paradigm among international and national institutions (including the EU). Inequality has thus become central in the Agenda 2030 and new kinds of targets, namely the "Sustainable Development Goals" were set.

This increase in within countries inequality in both "Global North" and "Global South" has been exacerbated in the last few years due to the impact of the COVID-19 pandemic, setting back progress by a decade or more (World Bank 2020, Decerf et al. 2020, Stantcheva, 2022). At the time of writing in 2022, the ongoing conflict in the Ukraine is likely contributing to increased poverty and inequality through its disruptive impact on raw materials, energy and food costs, in addition to massive sufferings and humanitarian crisis. These events have dramatically clarified that the impact of different type of crises is heterogeneous inflicting different costs to different group of persons (see for example Patel et al. 2020). According to IMF (2022), people living in emerging and developing economies will be hit more than those living in advanced economies.

Focusing on the European Union, the last 20 years have been marked by slight overall poverty reduction and convergence in median income which was interrupted but not overall reversed by the 2008 crisis (Gabos et al. 2021). The percentage of people living at risk of poverty and social exclusion (AROPE) declined from 23.8% in 2008 to 20.9% in 2019. Nonetheless, the 2008 Great Recession highlighted an only partly expected vulnerability to poverty of the European population: as an example, the total number of people at risk of poverty and social exclusion rose from 116.6 million in 2008 to 121 million in 2014.

EU aggregate indicators are likely to hide relevant inequalities between and within countries: despite EU's commitment to foster social cohesion across Europe, social inequalities have been increasing both within and between member states (Vandenbroucke and Rinaldi 2015). For example, a comparison of the evolution of national-level poverty rates shows huge differences across countries with some countries stagnating and some others showing substantial decreases in poverty rates.

The overall picture is still critical while moving from a uni-dimensional measure (such as monetary poverty) to a multi-dimensional approach centred on the wider concept of social rights which are linked to social citizenship according to structuration theory. Within the framework, social citizenship is composed by three dimensions: autonomy, protection and influence (Halvorsen et al. 2022).

Biggeri et al. (2022) elaborated the European Social Right Indicator (ESRI) starting from the social indicator dashboard (i.e. the Social Scoreboard) used by the EU to monitor the status of social rights and the progress toward the full implementation of the EU Pillar of Social Rights. The ESRI trend shows that those countries who were disproportionately hit by the 2008-2009 financial crisis (mostly Southern European countries) couldn't catch up the losses despite their improvements. Also, they show that the picture is even more complex when disaggregating the ESRI indicator in three sub-indicators (equal opportunities; labour markets; and social protection and inclusion). 14 EU countries show lower labour market indicator values in 2017 than in 2006.

In general, people who are left behind from a country's progress or those who are disproportionately hit by economic downturns and other crises, are likely to share some characteristics such as a low level of formal education, belonging to ethnic minorities, being a woman, living in a remote area (Kabeer, 2010). For example, in the UK it was found that BAME women (Black, Asian, and minority ethnic) were disproportionately hit by austerity measures (Fawcett Society, 2012) and then by more severe health complications of Covid-19 due to pre-existing chronic health conditions that made them more vulnerable (Qureshi et al. 2020). Similarly, EU estimates show that poverty rates for women tend to be higher than for men (with the only exception of Denmark, where the poverty rate for men significantly exceeds the poverty rates of women (Gàbos et al. 2021). In terms of territorial inequalities, while aggregate EU figures about urban-rural divide show that the gap has almost closed, this does not hold true for all the EU countries, with some countries such as Bulgaria and Romania having rural poverty rates much higher compared to urban poverty rates (Eurostat 2021). This phenomenon is usually referred as "horizontal inequalities" and describes the existence of inequalities in achievements between different social groups (Stewart et al. 2007, Stewart, 2017, Alberti et al., 2021). Group categories include parental status, ethnicity, religion, race, gender, age, disability, etc. However, it is not difficult to see that people by having multiple identities (Sen, 1998; Arciprete, 2015) belong to more than one socially defined group. Indeed, within the same group people are characterized by further social categories (such as being a Roma woman or being a child with disability in a single-headed family). The intersection between multiple socially devalued identities ('intersectionality') gives rise to mutually reinforcing disadvantages such as economic exclusion, cultural devaluation, lack of political representation, stigmatisation by the society. This in turn hampers their capacity to exercise social citizenship. When this happens, individuals are subject to intersecting inequalities, rather than to horizontal inequalities.

Despite the increasing availability of disaggregated data, empirical evidence on intersecting inequalities in the exercise of social citizenship in EU are not yet fully explored.

The objective of this paper is twofold. The first, as already mentioned, is to discuss theoretically the notions of intra-country inequality and social citizenship using intersecting inequalities framework and the capability approach, while the second is to explore the relative consequences in terms of data analysis using microdata. More specifically the two research questions addressed in this paper are:

1) What are intersecting inequalities and why they are relevant, together with the capability approach, for assessing gaps in the exercise of social citizenship?

2) What are the research implications of assessing gaps through an intersectional lens?

The suggested framework proposed here departs from the analytical lens of "intersectionality", then builds on the capability approach (Sen, 1985; 1992; 1999; Nussbaum, 2000; 2003; Robeyns, 2003, Biggeri and Ferrannini, 2014; Arciprete, 2015) dialoguing with the structuration theory and the social citizenship approach (Halvorsen et al. 2022). While the intersectionality approach allows for situating the discourse in its historical and political lens, the capability approach helps identify the multiple ways through which intersecting social categories can lead to multiple disadvantages. While, the social citizenship approach brings into focus the policy and research implications.

The remainder of the paper is structured as follows: the second section defines intersectionality. The third section illustrates intersecting inequalities. In the fourth section the capability approach is used as a framework for analysing intersecting inequalities and its linkages with the concept of social citizenship. The fifth section combines all the analytical concepts. The sixth section sets out the research implications. The final section discusses the findings.

2. Intersectionality

Intersectionality can be considered as a "methodology for research" (Symington, 2004). It enables hidden injustices to be disclosed by providing an understanding of social inequalities. It assumes that individuals belong simultaneously to multiple social groups and that the groups are socially ranked in terms of power. The hierarchical pattern among groups is not predetermined as the social construction of race, class, gender, *etc.* takes on variable meanings over historical time and across countries (Brewer et al., 2003). As such, the inequality experienced by individuals is the product of the interplay between different social groups to whom the individual belongs and it would be a mistake to focus on the single "identity" such as gender or ethnicity, separately. Although we use the term "identity", it is important to know that identity categories are the product of power relations, social policies and public discourses, and (as it will be discussed below) thus an excessive

focus on "identity" can lead to the risk of creating policies for micro-identities, rather than focusing on power structures and exclusion (Fredman, 2016). In brief, this approach analyses how the different grounds of discrimination interact with each other impacting negatively, as we are going to discuss in the next section, individual empowerment and agency, thus, more in general social citizenship.

A single–axis framework was dominant until the 80's among the anti-racist and the feminist movements which have both used gender and race as two mutually exclusive traits. This framework did not account for the unique experience of discrimination faced by black women. In the mainstream feminist discourse, the differentiation of the experience of discrimination between black women and white women was absent. In the same way, the anti-racist movements obscured the existence of further layers of subordination within the black community. The black represented themselves as a homogenous category despite the different ways black women and black men experienced discrimination. Positioned at the intersection between two different systems of oppression, black women have long been excluded from both feminist and antiracist movements, from academic discourse and from grassroots associations' claims. Similarly, disabled feminists have long denounced the white male-dominated disability movement (Morris 1991).

In response to the failure to consider the intersections between racism and patriarchy, in an influential law review article, critical race scholar Kimberle Crenshaw (1991) introduced the term "intersectionality". This term denoted the various ways in which race and gender interact to shape the multiple dimensions of the experience of marginalization faced by individuals at the margins (Brewer, Conrad and King, 2003). Until that point women's experiences were represented as they were all the same, regardless of other social categories. This type of approach not only standardized women's experience, but it also implicitly assumed white women as a standard. Intersectionality assumes that that when an individual is cut across multiple axes of discrimination, these axes should not be considered in an additive way, but rather through an intersectional lens (McCall, 2005). It means that we cannot merely add multiple discriminations, but we need to investigate how the different grounds of discrimination interact with each other. A distinction must be made between structural and political intersectionality (Crenshaw, 1991). The first refers to the various ways intersectionality shapes the experience of people crossed by different axes of discrimination. In the case of black women, class issues intersect with gender and race issues: "many women of color, for example, are burdened by poverty, child-care responsibilities, and the lack of job skills. These burdens, largely the consequence of gender and class oppression, are then compounded by the racially discriminatory employment and housing practices women of color often face" (Crenshaw, 1991:1245). Political intersectionality highlights that women of colour are situated within at least two subordinated groups that frequently pursue conflicting political agendas (Crenshaw, 1991). When this is the case, political strategies aimed at addressing one axis of discrimination might reinforce discrimination based on other traits. For example, feminism can marginalize ethnic minorities and anti-racist movements can reproduce the subordination of women. Public policies aimed at promoting e.g., gender equality can have limited effect if they do not account for social norms that prevent some group of women to have full access to opportunities/capabilities and, in turn, to social citizenship.

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Intersectional discrimination differs from multiple discrimination (Ruwanpura, 2008). The latter describes a situation where the individuals are discriminated based on one factor at the time. For example, an immigrant woman can be discriminated at home due to her gender and in the access to public services due to her status of immigrant. Differently from multiple discriminations, intersectional discrimination in the narrow sense occurs when different grounds of discrimination interact not separately, but rather concurrently (Makkonen, 2002).

Historically the failure to include the compounded experience of discrimination of black women in the feminist movements is attributed to several factors namely, the narrow definition of discrimination that is operative in anti-discrimination law (Crenshaw, 2001) and the predominance of a primordial understanding of identity which neglects its multifaceted nature. However, according to some scholars, the main reason why the claims of specific minorities have largely remained unheard within their broader groups was an explicit choice made by grassroots associations. The belief was that a disaggregation of the experience of the black could weaken the claim made by the overall black community: "*The failure of the feminist movement and the African American community to be inclusive and representative of the interests of all the members is neither a coincidence nor something arising out of the bad will. It has rather to do with the general dynamics of the group and group interest (..) An agenda, which would represent the true interests of the whole group in all its diversity, would simply be too diverse, unclear and perhaps self-contradictory and would hence be not viable and would have little chance of political success*" (Makkonen, 2002:23). The fragmentation of social movements was also mirrored in social sciences where studies of gender, race, ethnicity, migration, disability, age, sexuality, childhood, youth, age and eco-social policy themselves became disparate, specialist and siloed (Williams, 2021: 20).

The term "intersectionality" has mostly been used by feminist scholars to describe the intersection between gender and race. Today, it is acknowledged that intersectional analysis should not be limited only to gender and race, but it should rather be seen as the theoretical framework for analysing social stratification (Yuval-Davis, 2011) by linking the lived experience of individuals to the wider systemic patterns of power and privilege. Importantly, the single categories of gender should not be used as specific descriptors but rather as challenges to the existing inequalities. It is an approach in which analysis and practice are closely linked (Williams, 2021: 21)

3. From vertical inequalities to intersecting inequalities

Much of the debate on inequality focuses on vertical inequality without addressing agency and social rights (Halverson et al., 2022). Vertical inequality refers to inequality between individuals or households and it usually uses income or consumption as the dimension along which inequality is measured. The notion of horizontal inequalities was introduced later in time by Frances Stewart in 2001 to account for the existence of

multidimensional inequalities between socially defined groups (see also, Stewart, 2013). In the beginning this notion was mainly used to explain the upsurge of conflict in multi-ethnic countries[1]. Contrary to vertical inequality, the notion of horizontal inequality takes into consideration that some individuals are socially excluded because they belong to a certain group and not due to their individual attributes. Examples are the social, cultural, political and economic inequalities between White and African descendants in U.S; between protestants and catholic in Ireland; between Hindu and Muslim in India, and so forth. Tackling horizontal inequalities is important for development: high level of horizontal inequalities can undermine the well-being of the disadvantaged people, make poverty traps highly persistent and raise the likelihood of conflicts (Stewart et al., 2005; Bellanca and Arciprete, 2013). Furthermore, the existence of structural inequalities between social groups is a violation of human rights and it is intrinsically unjust since there is no reason why people should be systematically disadvantaged as a result of personal characteristics (Chiappero-Martinetti, 2020; Deere et al., 2018).

The difference between vertical and horizontal inequality has policy implications: "*while in the case of "individual exclusion", pro-poor policies will have to be focused on enhancement of individual capabilities and entitlement, in the case of "group exclusion", the focus of policy measures will have to be on the group as a whole for equal opportunity, since the basis of exclusion is the social/cultural factors associated with the group*" (Thorat, 2010:5). This has inspired the adoption of a multitude of policies that can be grouped under the umbrella of "affirmative action" in multicultural societies. These policies consist of a set of anti-discrimination measures intended to provide access to preferred positions in a society for members of groups that would otherwise be excluded or underrepresented. It is a mechanism to address contemporary social exclusion (O'Neil and Piron, 200; Darity et al. 2011).

Intersecting inequalities have become a recurrent term in development discourse (Kabeer, 2010; CPAN, 2014; ODI, 2014) because it was found that entire segments of the poor were left out or behind from their country's progress and that most of the "left behind" share some characteristics, such as being a woman, being indigenous, belonging to ethnic minorities, living in remote areas or being a person with disabilities and most of the time belonging to multiple devalued social categories reducing dramatically social citizenship.

Despite the growing interest in the notion of intersecting inequality there is not a consensus over a definition. Kabeer (2000; 2010) defines it as the "*identity-based inequality intersecting with other forms of inequality to define social exclusion*". Stewart (2014) defines it as the inequality that consider simultaneously the intersection between different disadvantaged identities (identity intersectionality) and the intersection between different dimensions of exclusion (dimensional intersectionality).

Table 1 Inequality by type

	Unit of Analysis	Dimension(s)	Social Category
Vertical Inequality	Individual	Economic	None

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[1] This main assumption is that 'when cultural differences coincide with economic and political differences between groups, this can cause deep resentment that may lead to violent struggles' (Stewart et al. 2007).

Horizontal Inequalities	Group	Multiple	One category
Intersecting Inequalities	Individual	Multiple	Multiple Categories

Source: Authors' elaboration

At table 1 above shows, contrary to vertical inequality that only focuses on economic indicators and differently from horizontal inequality that only focuses on one social category at the time (such as religion or ethnic group), intersecting inequality considers simultaneously the intersection between different disadvantaged social categories (such as being female and living with a disability) and the intersection between different mutually reinforcing dimensions of exclusion (such as being deprived in both health and education).

The experience of social exclusion faced by tribal (Adivasi) women in India (Rath, 2000) showcases an illustrative example. By being at the intersection between caste and gender, they suffer the effects of the two biased structures that are put in place. As women they are marginalized in both the public and intimate sphere. As Adivasi, they are discriminated in the public sphere, they live in the most remote areas of India, with scarce access to services; they do the most menial jobs, have limited political representation and are socially segregated. When the dimensional intersectionality couples with the identity intersectionality, as it is the case of Adivasi women, individuals are subject to intersecting inequalities, and they are denied the "normal" route out of poverty (Kabeer, 2010).

In this paper we propose a notion of intersecting inequalities that encompasses Stewart's view and add to it Frasers' framework (1995). Fraser (1995) argues that when economic disadvantage and cultural disrespect are entwined within the same person (called 'bivalent collectivities'), this can lead to a potential political dilemma. This is because their claims conflict: the remedy for economic exclusion mainly involves redistribution, while cultural devaluation requires recognition. The dilemma arises because "*politics of recognition and the politics of redistribution appear to have mutually contradictory aims. Whereas the first tends to promote group differentiation, the second tends to undermine it. The two kinds of claim thus stand in tension with each other; they can interfere with, or even work against, one another*" (Fraser, 2007:74). Gender and race for example, suffer both socio economic injustice and cultural misrecognition "in forms where neither of these injustices is an indirect effect of the other, but where both are primary and co-origin" (Fraser, 2007:78).

Let's take again the example of an Adivasi woman in India. Here, gender has a purely economic dimension (Harris-White, 2009): it structures the division of labour among paid productive and unpaid reproductive labour; and among high paid and low paid job. Furthermore, gender has also a cultural dimension. The devaluation of the female is expressed in a range of harms: sexual exploitation, child marriage, exclusion or marginalization in public spheres. Gender is defined as a bivalent collectivity, and it requires both abolishing the gendered division of labour and developing positive recognition to the devalued group specifically. Caste in India is another bivalent collectivity. Caste structures the division of labour between low-paid, low-status, menial, dirty, and domestic occupations and higher-paid, higher-status and managerial occupations (Deshpande, 2011; Basile 2013). Besides this economic dimension, caste also has a cultural dimension. The

devaluation of Adivasi is expressed through violence and discrimination in all spheres of everyday life (Thorat and Lee, 2005; Arciprete, 2016).

4. Can the capability approach help to disentangle intersecting inequalities?

The capability approach (henceforth CA) is an alternative framework for social justice based on the notion of capabilities, functionings and freedom of choice (Sen, 1999). It was formulated by Amartya Sen in the 1980's in response to the limitations of income as the unique metric to evaluate alternative social arrangements. Indeed, for the human agent healthy, working, who does not bear responsibility of domestic and care work, income can be a good proxy for well-being. However, for those who are not represented by this ideal human agent, income can tell very little about his/her well-being (Robeyns, 2003). For example, in the case of persons with disability, measures, such as the capability to be independent reflects much more than income level the actual well-being.

The CA was deliberately left incomplete and indefinite by Sen and has been developed by many authors including Nussbaum (1998, 2000, 2003) Chiappero-Martinetti and Moroni (2007), Robeyns (2005; 2016), Alkire (2002; 2008), Biggeri et al. (2011; 2014). The CA should not be interpreted as a normative theory that can explain poverty or inequality, but rather as a framework to evaluate different social arrangements and to promote those policies that are more likely to generate considerable capability expansion (Robeyns 2005, 2016; Alkire, 2008).

CA's main contribution consists in broadening the informational space needed for the evaluation of well-being. Individuals' wellbeing should be assessed according to the freedom people have to achieve the things they have reason to value (Sen 1999). In fact, since people differ in their capacity to convert resources into real freedom, the possession of the commodities does not reflect the real freedom people have. To take a simple example, to get the freedom to move, a disabled and a non-disabled person need different commodities. "*Since the conversion of primary goods and resources into freedom to select a particular life and to achieve may vary from person to person, equality in holdings of primary goods or resources can go hand in hand with serious inequalities in actual freedoms enjoyed by different persons*" (Sen, 1992:81).

The informational space for evaluating alternative social arrangements includes capabilities and functionings. Capabilities have been formulated by Sen in a variety of ways (1980; 1985; 1999). Overall, they can be considered as freedoms, as the opportunities that an individual has, to lead what they deem as a valuable life. Some capabilities are considered 'basic', relating to the ability to achieve certain crucial functionings, such as avoiding starvation. Other capabilities are more complex (such as the capability to participate in political life). Development is thus about the expansion of the capability set, rather than simply the expansion of functionings

which are people's actual achievements in terms of beings and doings (i.e. being nourished, being healthy, etc.).
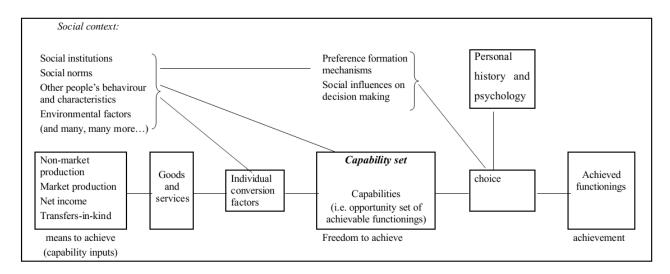
There are four cases where the appropriate space for the evaluation of well-being is functionings and not capabilities. First, when we can plausibly assume that no one wants to be deprived in a certain capability, such as in the capability to be bodily integer (Nussbaum, 2000). Second, when individuals have less capacity to make complex choices (such as very young children or severely mentally disabled persons). Third, when we need to assess well-being among highly deprived individuals for which strong adaptive preference can bias their capability to choose what it's more valuable for them. In addition to this, one researcher might choose functionings over capabilities when dealing with practical issues (Sen, 1992). Besides these specific cases, the evaluative space should comprehend both capabilities, functionings in addition to agency.

The distinction between capabilities and functionings is between the realized achievements and the achievable ones. Between the two there is the freedom people have, to choose things they value: "*For example, every person should have the opportunity to be part of a community and to practice a religion; but if someone prefers to be a hermit or an atheist, they should also have this option*" (Robeyns, 2005:95).

Sen distinguishes among the "process aspect" and the "opportunity aspect" of freedom. While the latter refers to real opportunities to achieve the capability, the process aspect relates to the process of autonomous choice, that is making ourselves the decision. Both the aspects should be considered when assessing freedom (Sen, 1993).

The CA incorporates the concept of agency. According to Sen, ''*the people have to be seen, in this (development as freedom) perspective, as being actively involved — given the opportunity — in shaping their own destiny, and not just as passive recipients of the fruits of cunning development programs*'' (Sen, 1999:53). Agency refers to what a person is free to do and achieve in the pursuit of whatever goals or values he or she regards as important. It is important to notice that the concept of agency is strongly linked to the promotion of social citizenship. Indeed, social citizenship can be considered as the achievement of a set of relevant functionings e.g. for the EU. Therefore, it is analytically important to distinguish between "agency freedom" and "well-being freedom". To understand the difference between the two, the notion of "commitment" can be of support. This means breaking the link between individual welfare and the choice of action. Sen writes: "the pursuit of private goals may well be compromised by the consideration of the goals of others in the group with whom the person has some sense of identity" (Sen, 1985:348). To take a simple example, if a person decides to volunteer for an NGO although this implies a substantial reduction of the time to dedicate to family and friends, this decision will probably entail a reduction of the person's well-being. However, this option was freely chosen by the person. This is agency freedom. When the person acts in order to pursue his/her well-being, this is wellbeing freedom. Having introduced the concept of commitment causes another substantial departure from traditional models of economic theory which accounts for self-welfare choice, but not for "self-goal choice" (Sen, 1985). Figure 1 below illustrates graphically the representation of the CA.

Figure 1 - The Capability Approach

Source: Robeyns (2005)

Since its introduction, the CA has attracted some critiques. The concerns can be grouped in two families of criticism. The first strand of critiques regards specific aspects of the CA (for a review, see Clark, 2005). These critiques are advanced by those who disagree on some aspects within the CA improving the approach itself. Ballet, Biggeri and Comim (2011), for instance, introduce in the capability approach the concept of evolving capabilities which incorporate the notion of agency and analyse the process of capability expansion/reduction. The concept of agency is strongly linked to the promotion of capable agent (Bonvin and Galster, 2010) and thus to the promotion of social citizenship. Biggeri and Ferrannini (2014), moreover, expand Robeyns's static model by introducing dynamics (feedback loops) processes, including individual and social empowerment, collective capabilities and territorial functionings. Bøhler, Krasteva, O'Reilly, Vedeler, Stoilova and Tolgensbakk (2019) have criticized the formulation of conversion factors (see next section) for being too broad to apropriately capture the contribution of each factor. The second strand of critiques challenges the usefulness of the CA itself on the ground that it cannot be formalized and made operational and that therefore it is an "unworkable idea" (Robeyns, 2000). This last point is nowadays overcome by many examples of empirical analyses.

Conversion Factors

The concept of intersecting inequalities is linked to human diversity which is a key characteristic of the CA. It is important to remind that standard economic theory has rarely acknowledged that people differ substantially in terms of their income using ability and income earning ability. In fact, while several economic studies address issues such as gender and ethnic segregation (primarily in the labour market), little relevance has been attributed to the role social categories (such as gender, ethnicity, etc.) have in shaping people's capabilities economic and non-economic opportunities and capacities. Indeed, in economics, individuals have mostly been

modelled as anonymous actors only differentiated by their budget constraint, set of preferences and degree of risk aversion. However, societies are never unbiased towards religion, gender, health impairment, age, race, etc. The neutrality of the "homo oeconomicus" is thus a highly problematic assumption, as it applies only to the able-bodied, non-dependent, care duties-free male who belongs to the dominant ethnic, racial linguistic and religious group (Nussbaum, 2006). In orthodox economics, people who do not fit that ideal type are substantially invisible. On the contrary, the CA gives crucial importance to human diversity. As Sen states: "human diversity is no secondary complication (to be ignored, or to be introduced 'later on'); it is a fundamental aspect of our interest in equality" (Sen,1992: xi).

This issue is primarily addressed, in the capability approach, through the notion of conversion factors. They can be grouped in three types: individual (health, impairment, talent, status, sex, etc.), social (social norms, gender norms, power relations) and environmental (climate, pollution, etc.). Conversion factors refer to the fact that individual differ in their capacity to convert resources into real freedoms and rights fulfilled. For instance, given the same level of educational profile, a black woman in a society characterized by patriarchy and male domination has less chance to have a successful professional career than white men have. For this reason, an effective capability enhancing policy may consists in fighting homophobic, ethnophobia, racist or sexist social arrangements rather than merely increasing disposable income (Robeyns, 2013).

This is a key link with the intersectionality approach that can be further specified. Conversion factors are mutable to a varying degree (Sen, 1998) (especially the individual and the social ones based often on "culture") and the extent to which this is possible strongly varies across type of conversion factor and according to the society where we live and the social preferences which influence the behaviour and the social norms. To simplify this complex issue, it is worthwhile at least to distinguish four categories. The first and second categories are those characteristics of the individual living in a certain society that are difficult to change. The first are biological (e.g. sex) while the second are non-biological (e.g. caste). These categories are shaped through public policies and political discourses. Although the salience of each of these categories can change across time, they are generally perceived as static across the life of an individual. The third and the fourth categories are mutable. The third category is special and corresponds to those physical characteristics that change due to the time and natural (body and mind) development (age). The fourth refer to characteristics that relate to skills that can be changed for instance through rehabilitation (in case of a person with disabilities) or by learning. An example of the mutability of a conversion factor is the social consequences of living with the human immunodeficiency virus (HIV). In the 1980s a person living with HIV had an extremely low life expectancy and was discriminated in all spheres of her life (access to job, social relations etc.). Today, at least in high income countries, the availability of effective anti-retroviral therapies and massive awareness raising activities have enabled people living with HIV to live longer and healthier lives and to enjoy a much wider capability set.

Today, amidst climate changes events, we clearly see how environmental factors do change over time and often in an unpredictable and sudden way changing the places where we live and disproportionately affecting the lives of poor people. Among poor people some categories of people are even more vulnerable. For example,

children are over-represented in the countries that are most affected by the consequences of climate change, are exposed to some risks that adults are not, can't control their exposures to the risks, and depend on their parents` care and ability to protect them (UNCRC, 2017). In their attempt to combine the capability approach with the concepts of social resilience and citizenship, Halvorsen et al. (2022) have introduced the notion of conversion process as a *"tool for understanding the diversity among persons at risk of poverty and the conditions that need to be in place to enable these sections of the population to exercise citizenship".* Rather than focussing on the individual conversion factors, they analyse the interaction between factors over time.

In conclusion, policies informed by the CA do not ultimately aim at equalizing means, but rather at altering the distorted structures (such as sexism, ageism racism, ableism, homophobia, transphobia) that impede that everyone has equal opportunities.

Identity, Preferences and Values

How people identify themselves with a particular group is central to understanding behaviours and the formation of social preferences which influence individual preferences. A person's ability to reason about her values is influenced by how she relates with others (Sen, 1985). The fact that women tend to attribute more importance to issues such as family and care than men can be explained through adaptive preferences (Elster, 1982). However, in addition to being a woman, she also inhabits multiple social relations of power pertaining to ethnicity, race, class, etc. The commitment to different social categories can conflict, because they can have different – if not opposite – claims and preferences. As Hogget (2001) argues, the individual is not a unitary and rational subject, and the agency can be contradictory and ambivalent.

People might choose to act against their individual welfare due to the commitment toward a particular group: *"We all have many identities and being "just me" is not the only way we see ourselves". Sometimes alternative identities can compete for relevance. Community, nationality, class, race, sex, union membership, the fellowship of oligopolists, revolutionary solidarity and so on, all provide identities that can be, depending on the context, crucial to our view of ourselves, and thus to the way we view our welfare, goals, or behavioral obligations* (Sen, 1985, p. 348).

Social identification has a perceptual role (it influences the way we perceive and understand the world) and a delineating role. The latter means that social identity influences what we perceive as a social good (Sen, 1995). People's decisions are shaped by what they consider to be good. They vary across different social groups. Social meanings can be gendered, as well as can vary with class, place and ethnicity and the meaning of "good mother" can be different for women belonging to different social class (Williams, 2021).

Sen critiques the view of identity as something crystallized over which people do not have any command. He argues that people have the faculty to choose to whom they want to identify with each time. Behavioural economics and gaming in societies are used to challenge the stereotyped understanding of identity. Of course, Sen acknowledges that there are some limitations, due for example to our looks and our circumstances, but the

choice exists – although with constraints. The unquestioned adherence to a certain social identity might have conservative implications: "*Indeed, traditional inequalities, such as unequal treatment of women in sexist societies, often survive by making the respective identities, which may include subservient roles of the traditional underdog, matters for unquestioning acceptance, rather than reflective examination*" (Sen, 1998: 19). Denying plurality, choice and reasoning in identity can lead to violence and brutality. Although reasoning itself can be influenced by our inherited identity, influence is not deterministic, and people do have the capability to choose among multiple identities. The way identities influence choices continuously evolve as identities are re-shaped and re-signified over time.

In conclusion, social identity has an influence on behaviours and preferences. However, identity is not exogenous: although some identities are inherited or are perceived by people themselves as inherently innate (ascriptive), individuals are still capable to reason independently of their contexts and to choose – to some extent – with whom they want to identify. Thus, policies should not contribute to reinforce the identities in a crystallized way but should rather encourage the freedom to choose to which identity we want to belong.

Collective Agency and Capabilities

Individuals cannot be considered independently of the context and of the relationships with others (Stewart, 2013). Importantly, the CA embraces ethical individualism that is "individuals as unit of concern", rather than methodological individualism that is the view that everything can be explained by reference to individuals and their properties (Robeyns, 2003).

That individuals belong to groups can been articulated in three main aspects. On one side, as it was illustrated before, groups determine social identity which in turns influence preferences (although this process goes in both the directions). On the other, belonging to a certain group can lead to an expansion of capabilities, the so called "collective capabilities". Collective capability lacks a common definition. Sen identifies as collective capabilities only those capabilities related to humanity at large, such as drastic reductions in child mortality (Sen, 2002). They have also been defined as the capabilities which are achievable only when individuals take part to groups – such as political parties and unions. According to Evans (2002:56) _: "*they "provide an arena for formulating shared values and preferences, and instruments for pursuing them, even in the face of powerful opposition*". Collective capabilities have also been conceptualized as: "the *newly generated functioning bundles a person obtains by virtue of his/her engagement in a collectivity that help her/him achieve the life he/she has reason to value*" (Ibrahim, 2006:398). This definition encompasses two concepts: first, that the engagement in the collectivity is to be interpreted in terms of collective action. Second, that the collective action enhances both individual and collective well-being (ex. self-help groups which allow poor people to pursue goals that would not be otherwise available to them). Ballet, Dubois and Mahieu (2007) embrace a different approach. To understand the production of collective capabilities they assume that individuals and their actions can only be understood within a network of social relations which attribute to everyone a set of

responsibilities. Responsibilities are crucial as they precede actions. Collective capabilities are the result of collective action which enlarges individual capabilities. Collective action stems from the set of mutual obligations. To put it differently, people are encouraged to combine their capabilities in order to pursue collective capabilities when they belong to a social network from which they consciously derive their responsibilities. The systematic deprivation of capabilities of a group of people often determines the need for collective actions and the creation of movements to enhance social empowerment favouring individual empowerment and agency (Biggeri et al 2011, chapter 16)

Deneulin (2005; 2008) calls "collective capabilities" the structures of living together that can explain the success and the failures of countries to promote individual capabilities. A slightly different concept is the notion of group capabilities (Stewart, 2002; 2005) which includes the social, cultural, political and economic resources that accrue to individuals due to their membership. Group capabilities are not simply the sum of individual capabilities, indeed when individuals interact to pursue a common goal, the interaction among individual capabilities gives greater outcomes than just the sum of them (Stewart, 2005).

However, these contributions underestimate the role of intersecting inequalities in mobilization. Focusing on commonalities rather than acknowledging that people are shaped by multiple intersecting forms of discrimination can facilitate collective action. Hence, social movements have traditionally focused on a singular dimension of identity and oppression. In the case of feminist struggles, for example being part of an advocacy group was functional for the expansion of the capabilities of the women. However, that group was implicitly advocating white women's needs which were different from those advocated by black women. The neglect of the heterogeneity within the women groups had led to an unequal appropriation of the benefits of the feminist struggle. Overall, non-individual capabilities can be defined as the capabilities that arise as the result of collective action and that cannot be reached independently of others. This implies that within a group some individuals are characterized by further devalued identities and any collective capability derived from collective action will not be equally distributed among its group members.

In recent years emerging social justice movements (such as #BlackLivesMatter) have increased group intersectional consciousness and capacity (Irvin et al. 2019). However, the tension between universalistic approach and particularistic politics still exists: if we take the concept of intersectionality to the extremes, the risk is to fractionalize the front of those calling for an evolution of society in the direction of greater inclusiveness and equity. This risk is even greater since alternative political messages are often based on hyper-simplification and the captious use of uni-dimensional identities ("American First," "Italians First" etc. etc.) (Williams, 2021).

Territorial Functionings

Every person lives in a specific place which is characterized by certain tangible and intangible features: the former refers to geographical and infrastructural factors and services available, while the latter may refer to predominant values, culture and traditions diffused in the area that make up the identity of the local community

(Biggeri et al. 2018). The opportunities that every person has access to depends on her characteristics (level of education, gender, etc.) and on how they interact with the characteristics of the place where she lives. *Place* as such has the potential to shape the social meanings of categories. It follows that living in different local communities can make the difference in many domains of our life and well-being. For example, a woman with no driving license will have much lower level of freedom (and economic empowerment) if she lives in a place without accessible service of public transportation compared to the same woman living in a well-connected area. Such processes cannot be easily framed within static, sectorial or mono-dimensional analytical frameworks. In this regard, Biggeri and Ferrannini (2014) have introduced the Sustainable Territorial Evolution for Human Development (Fig 2 below) to account for the territorial patterns that have influence on the opportunities that are available to the individual, these includes localized social norms that shape the meaning of social categories.
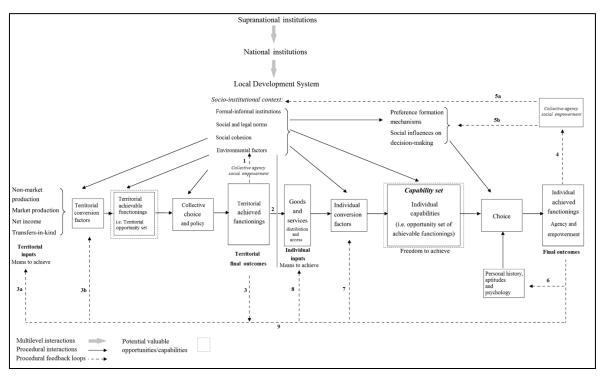
Figure 2   The Sustainable Territorial Evolution for Human Development

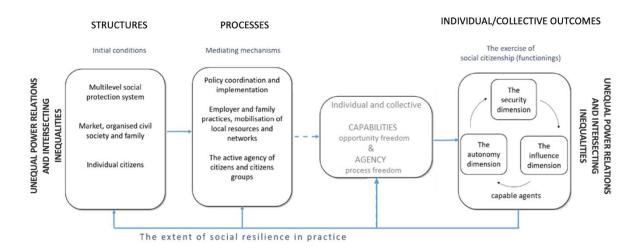Source: Biggeri and Ferrannini (2014)

5. Towards the process of social citizenship

Intersecting inequalities denote the multiple and mutually reinforcing disadvantages that individuals experience due to the intersection between two or more devalued - both economically and culturally - identities.

What does it imply in terms of capabilities reduction or expansion? First, by inhabiting multiple social relations of power, the conversion factors that allow a given person to transform inputs into opportunities are the result of the combination of conversion factors that apply to each social category. It is important to recognize that social categories depend on cultural hegemonies and structural inequalities as they change over time. So, for example, a Caucasian man with disabilities will be on the one hand favoured in terms of opportunities to have a good job due to his ethnic group and his gender; but on the other he will be disadvantaged due to a system that is biased against people with physical disabilities. Thus, his capability set will depend on the interplay between different set of conversion factors in a specific place and point in time. Second, intersectional identities influence individual preferences, what people value as important, how to perceive the world and what to perceive as "good". Third, being part of a group can enlarge the capability set either by engaging voluntarily in collective action with other members or by simple means of relationship (external capability); however, when within a group some individuals are characterized by further devalued identities, collective action is more difficult, and the benefits of policies are not distributed equally among group members.

Thus, those who are subject to intersecting inequalities face several capability deprivations that depend on economic and cultural past and present arrangements of the society. Also, it is hard for them to engage in collective actions that bring advantages to them due to their multiple – intersecting identities. Recognizing this, also consolidates the obligations that society has in enforcing rights and social citizenship fulfilment. Importantly, individual conversion factors can play a relevant role when combined with the environmental and social conversion factors. That's why it is important to examine interdependencies in conversion factors along with institutional and other factors that can be linked to structuration theory (Halvorsen et al., 2022). In figure 3 the linkages between these different elements are reported linking power relations and intersecting inequalities with structures, processes, capabilities and agency (as capable agent) and social citizenship fulfilment as described in the structuration theory. By permeating structures and processes, unequal power relations result in intersecting inequalities in the exercise of social citizenship.

Source: our elaborations on Halvorsen et al. 2017; Halvorsen, et al. 2018; Eggers, Grages and Pfau-Effinger 2019
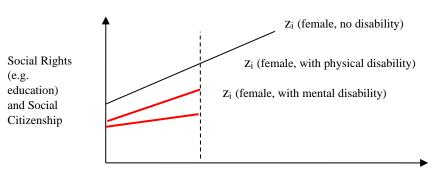
6. Research implications

The European Pillar of Social Rights (EPSR) was set out in 2017 by the EU to act as a compass for a strong social Europe. It sets out 20 principles in three main domains: (1) equal opportunities and access to the labour market (2) fair working conditions and (3) social protection and inclusion. The ESPR is accompanied by a Social Scoreboard which includes 14 headline indicators and 21 secondary indicators to track trends and performance across EU countries. This paper has set out the relevance of using an intersectional approach to the study of inequalities in social rights. As discussed throughout the article, this approach requires focusing on the points of intersection, embracing complexity, and accounting for dynamic processes. In doing so we need to investigate the social structures that define the access to rights and opportunities, rather than defined categories or stand-alone measures of diversity. (Symington, 2004). As intersecting inequalities can only be understood without separating economic and political structures, cultural meanings, and history, this approach welcomes interdisciplinarity (Charusheela, 2013). An illustrative example of a study addressing intersecting inequalities is the report "Intersecting Inequalities: The Impact of Austerity on Black and Minority Ethnic Women in the UK" by the Women's Budget Group. Through qualitative and quantitative methods, this study measures the cumulative intersectional effects (here, race, poverty and gender) of austerity policies (welfare benefits, taxation changes and public spending cuts). Furthermore, embracing an intersectional approach

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requires reflexivity and the recognition that people who inhabit these categories can exert agency, which is individual, relational and collective.

As of today[2] , the ability of the Social Scoreboard to describe the actual access to social rights for vulnerable groups is limited. Gabos et al. 2021 show several limitations to apply an intersectional approach as there are vulnerable groups for which estimates are not reliable (e.g. migrants) and the problem is more accentuated when further breakdown is done (e.g. young migrant women). Furthermore, many dimensions are not present in the social scoreboard albeit they are relevant to assess the enjoyment of social rights for particular groups of population (e.g. access to adaptive technology for children with disabilities, or assessing reproductive rights for women). A recent attempt to address some of the weaknesses is represented by the EU Multidimensional Inequality Monitoring Framework (MIMF) set of indicators.

It is against this backdrop that we propose a stepwise approach to measure intersecting inequalities in social citizenship using micro data. This approach will require sensitivity to the question of salience. As the salience of each social category changes through time and place, we need to situate the categories in the political, social, economic and cultural norms that shape their meaning. Then, we need to identify the indicators that describe the access to social rights that are relevant for each social category and assess their availability. Third, we will disaggregate available outcome indicators according to groups and subgroups of the population to have a comprehensive descriptive picture. Subsequently, we will conduct regression analysis to measure how the salience of each social category changes across times, social rights and in its interaction with other social categories. This analysis can be visually represented by the example in the figure below:

Figure 4 - Intersectional Approach

Source: our elaboration on Zaidi and Burchardt (2005)

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[2] Social Scoreboard is in the process of being updated

Drawing on Zaidi and Burchardt's framework, Fig. 4 graphically depicts the relation between means to achieve and the access to a social right for three ideal types: a female without disability, a female with physical disability and a female with mental disability. Figure 2 above describes a situation where being a girl with disability implies a reduction of wellbeing and social rights, but it does not entail a double loss, thus the lines are not parallel.

Drawing on the literature on intersectionality we assume that the functional form of the woman with disability is flatter, meaning that she needs relatively more resources to increase her well-being in the given dimension. We also assume that the function form is not constant across dimension, thus while in some dimensions gender and disability alter substantially the functional form, in some others (such as in the opportunity to live in a clean environment) disability and gender do not influence the capabilities to equal extent. Finally, we assume that the functional form is not constant throughout age, with gender becoming particularly salient during adolescence, and disability being salient in childhood and decreasing its salience in adulthood.

These elements that compose intersectionalities can be extended adding other characteristics of the individual (caste for instance) or the place and territorial functioning where the persons lives (e.g. in remote mountain areas of European countries). Clearly these persons have different opportunities. In this way it is possible to capture the most binding constraint or to rank the barriers to opportunities of persons in different places.

7. Final Remarks

Social policy and welfare regimes have long ignored gender, disability and other social categories making invisible the differentiated impact of welfare regimes on people with different needs. Apparently neutral institutions have been modelled on the needs, interests and value of the dominant groups thereby creating exclusion and barriers for other members. Traditionally, inequalities among groups have been mitigated by means of so-called accommodating policies. It includes measures such as exempting some people from specific laws and granting specific communities some degree of autonomous jurisdiction. There is a debate in literature about the potential negatives effect of accommodating policies on those at the margins of the group - especially on the conditions of women (Singh 1994; Volpp 1996; Okin 2004). Indeed, evidence show that in some cases these policies have reinforced the power hierarchies by further marginalizing those who are the bottom of the accommodated group (Sachar, 2001). This phenomenon is known under the name "paradox of multicultural vulnerability". Many examples of this tension are documented in the family law arena where the allocation of autonomy to the community often comes at the expense of the rights of the women. In India for example, having bestowed rights to religious minorities (Catholics and Muslims) led to a deterioration of the freedoms enjoyed by women, because the fundamentalist leaders historically used the personal laws as tools for denying equality to women (Jain, 2005). Thus, there exist a conflict between the necessity to preserve the norms of the community and the need to secure the rights of the members of the community as members of the State.

Similarly, development programs that have focused on distribution of goods and services to specific essentially defined groups (e.g. women, children, people with disabilities), have left unchallenged the relations that generate injustices, and leaving unconsidered the implications of the intersection of the numerous relevant attributes that define a person and her situation" (Frediani et al. 2014: 3).

The few years have shown an increasing attention to the intersectional approach. This was possible for many reasons including the role of social movements that are increasingly showing how different crises (global financial, social reproduction, climate and ecological, migration) are inter-related (Williams, 2021).

It is against this backdrop that analysing social citizenship in Europe requires adopting an intersectional approach both in terms of analysing gaps and in terms of policymaking. While this paper has set out a methodology for applying an intersectional lens to the analysis of gaps in social citizenship, further EUROSHIP contributions will focus on policy and concrete expressions and configurations of social citizenship. The aim will be to identify ways of balancing universalistic and particularistic politics and policies as well as to strike a balance between politics of redistribution and politics of recognition.

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