

Equaliberty under pressure. Challenges for educational science and (social) paedagogy¹

Fabian Kessl, University of Wuppertal

1 Introduction: Equality and liberty – relevance of an underestimated relation

Equality is the basic premise of democracy. At the same time its actual realisation in existing democracies has always been limited. The relation between equality and democracy and the fact that historically its substantiation has never been fully achieved reveals the historically equiprimordial nature of equality and liberty (Balibar 2010/2012). Since the 18th century this equiprimordial nature, as an „equation of human and citizen” (Balibar 2010/2012, p. 89; own translation), constitutes the ideal of the emerging bourgeois society (*bürgerliche Welt*). The necessity of a boundedness of equality and liberty has been known since ancient attempts to establish the *πόλις* (*polis*). However, in the city state of Athens an Attic man's liberty as a citizen, meaning as a political agent, was not bound to the concept of equality as a human right, but to his exclusive power position in the household (*οἶκος* (*oikos*)). The male Attic citizen's control over reproduction, care and relationships in the private household guaranteed the necessary foundation for his political agency and acting in (political) liberty. Hence, the political participation of an Attic man was bound to securing his livelihood. The separation of public and private sphere as a principle is still effective in bourgeois society (Rosenbaum/Timm 2008). However, the Attic polis and bourgeois society of the modern world are entirely different: Attic citizenry was particular, as only grown and free men enjoyed the privilege of being part of it. A universal conception of mankind as citizens (human right) did not exist yet. Therefore the *polis* as a political public sphere, and hence as a space of liberty, always remained limited. The establishment of Bourgeois society did not bring an end to this structural logic. In parts of Switzerland it could be experienced first hand just a few years ago: In 1989 the community of Appenzell Innerrhoden which was represented exclusively by men defeated a motion for women's suffrage in a direct vote.²

What Etienne Balibar (2010/2012) described with his neologism of “equaliberty” (*l'égaliberté*) can structurally be traced back to the concept of the Attic *polis*. Here the boundedness of political and social participation can already be found in its early forms. Historically, the concept of equaliberty – understood as an equalisation of human being and citizen – has been introduced as a recognisable and viable ideal during the French Revolution. The concept of equaliberty as part of the political and legal system of Bourgeois society has been reified in former OECD states since the end of the 19th and the beginning of the 20th

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² Women's suffrage was implemented in Appenzell Innerrhoden not until two years later on the basis of a legal decision by the Swiss Federal Court. This decision was made on the insistence of a group of women.

century. Now, securing one's livelihood is not merely a private responsibility anymore, but a public one – it becomes a collective responsibility in the growing welfare states, on a national level (Evers/Nowotny 1987). The institutions of the welfare state are now responsible for guaranteeing a certain degree of equality for each member of society (citizen). Similarly to political liberty in the Attic polis, equality finds its expression in social integration and becomes a public good which marks the end of the supremacy of the private sphere. Hence, the relation between equality and liberty in regard to equality materialises as a “solidarity among strangers” in the welfare state (Brunkhorst 2005). A universal promise of equality is thereby established. This applies to all those members of society who are entitled to a formal status of belonging through their citizenship. As the concept of equality in welfare states is understood in terms of national states and state membership, the universal solidarity among strangers is confined to the domestic members of the existing (national) society: Universality in welfare states refers to the community of citizens, not to all human beings (Balibar 2010/12, p. 41, Castel 2003/2005, p. 56). The limited validity of this specific form of human rights is reflected in the fact that a French citizen feels solidarity towards others who own a French passport through their shared legal and institutional regulations and systems. Likewise a Swedish citizen would feel solidarity towards other Swedish citizens. As a specific population group, they share social insurance benefits or means of taxation and support public provision and allocation of social services (i.e. youth welfare services) as well as education (schools) and health services (hospitals). However, despite this limitation the scope of the welfare state's promise of equality should not be underestimated. Speaking in terms of social contract theory this arrangement can be seen as an agreement between members of society which legitimises the provision and usage of insurance, supply and welfare services for all citizens (Witterstätter 2000), without knowing the other members of society, i.e. the potential users of these services, in person. This promise of equality is based on the assumption that despite the unfamiliarity among themselves there exists an abstract yet relevant level of communitisation (*Vergemeinschaftung*), namely the national state. German welfare legislation is an illustrative example of this: Otto von Bismarck aimed to use the state social insurance system, which has been implemented under his command since 1883 and can be seen as rather progressive considering its implementation at the end of the 19th century, to contribute to the “inner nation-building” (Kocka 2016, p. 402; own translation).

However, not only the national state structurally limits the scope of the welfare state's promise of equality by constructing it on the basis of a structural difference between the inner sphere, i.e. citizens, and the outer sphere, i.e. foreigners or stateless people. Similar to the concept of equality's limitations on the basis of social class differences but also on the basis of property boundaries in the Attic polis, the concept of private property restricts the welfare state's promise of equality. The concept of private property legitimises different states of inequality – through unequal availability of means of production or wealth – and thereby factually limits the welfare state's promise of equality. Bourgeois society reifies as a capitalist society. This was politically intended, as German welfare legislation also illustrates: It was Bismarck's precise intention to undermine alternative political demands for equality, especially socialist ones which questioned the concept of private property, by implementing his system of welfare policies (Baldwin 1990).

Nevertheless: Despite these structural limitations of the welfare state's universal promise of equality the concept of universality of equality and liberty is clearly stated in Bourgeois society of the modern world.

However, the realisation of the concept of equaliberty is not only limited in regard to the principle of equality, but also in regard to the concept of liberty. Since the first attempts of its realisation³ the concept of equaliberty had to be frequently re-reified and defended as 'libertyequality', because the equation 'human being = citizen' is subject to a constant historical discussion.

At first glance it seems to be clear which individuals are accepted as citizens and hence can claim and exert their civil rights and liberties. However, in reality the question of citizenship and who is entitled to it is never fully answered. This is reflected in the constitutional discussion on disabled people's right to vote in Germany at the beginning of 2019 and in debates on naturalisation, suspension of deportation and deportation in regard to immigration law and foreigner's rights that have been going on since 2015 in Germany, too. The implementation of the concept of equaliberty in its historical realisation as 'libertyequality' is even more fundamentally challenged by its democratic formulation of political liberty. Political liberty, in a democratic sense, implies creating a forum for every conflict where the "involved opponents' equality or inequality is brought into play" (Rancière 1995/2002, p. 63; own translation; Sturzenhecker 2013, p. 44ff.). (). However, this constellation is constantly threatened as each implementation of structural order is accompanied by the institutionalisation of social inequality and the exclusion of specific population groups from political sovereignty (Lütke-Harmann/Kessl 2013, p. 140). Hence the democratisation of politics only becomes achievable when „the very configuration of power relations" itself is can be on the line, i.e. when factually different positions can contribute to the conflict in a non-belligerent argument (Mouffe 2005, β.21). However, the solution that Rancière offers for this problem, namely to insist on a guarantee for equality, leads to a dilemma of democratic theory: 'Libertyequality' is reduced to 'equality of safety'. The focus of politics of a shifts from the unconditional guarantee of political liberty as a fundamental civil right to the „undisturbed development of the life process" (Arendt 1968, p. 150). However, as Arendt would reply to Rancière's preference of equality, this endangers liberty as such. Only in the public sphere, the domain of reciprocal referencing, hence in the domain of the political and acting; only there we recognise that liberty is positive and that there is more to it than 'not being forced' (Arendt 1958/2017, p. 48; own translation).⁴ This assumption is the reason why Arendt draws on the concept of the Attic polis and the importance of its strict separation of

³ The necessity of a permanent realisation of the concept of equaliberty can be illustrated in two ways.

(1.) One argumentation is on the basis of legal theory. Christoph Menke (2005) stressed the importance of the fact that legal rights in Bourgeois society are always subjective and hence are based on the individuality of each member of society. Therefore, liberty in terms of legal liberty is always ambiguous: subjective rights empower individuals – hence social legislation in this respect should not only be interpreted as the state's obligation to guarantee participation, but as means to enable individuals to participate politically. However, subjective rights always entail the danger of individual (private) arbitrariness which is symbolised in the capitalist rule in the sphere of production which leads to a rule of exploitation and coercion (Menke 2005, p. 271). The historical examination of the concept of equaliberty is specified in this dialectic of rights which entails both the ability to empower and the potential to unleash individual arbitrariness. (2.) With reference to the logic of Claus Offe's (1984) "contradictions of the Welfare State" and Stephan Lessenich's (2009, p. 132) work on the actualisation of this model, a second dialectic can be found when arguing in terms of a theory of the state. The concept of equaliberty in its concrete form as a capitalist and democratic welfare state always entails the simultaneous and contradictory requirement to act according to capitalist economy and react to democratic demands (Lessenich 2009, p.149). Hence, the dialectic of the economical functionality demand of the state's decisions and their democratic reasonableness reflects the constant discussion of the realisation of the concept of equaliberty.

⁴ German Original: „im Bereich des Politischen und des Handelns; nur dort erfahren (wir), was Freiheit positiv ist, und dass sie mehr ist als ein Nicht-gezwungen-Werden“

the private and the public sphere, although the Attic *polis*' conception of liberty only applied to particular people (Thürmer-Rohr 2011; critique: Benhabib 1994). Analogous to the Attic *polis* the domain of the social, i.e. the securing of social integration, must be strictly separated from domain of the political, i.e. the sphere of political liberty, in Bourgeois society. The problematisation of every tendency to convert 'libertyequality' to 'equality of safety' is vital and critiques of Rancière's conception that have been developed in respect of Arendt are convincing.

However, the ideal separation of domains poses a dilemma in itself. In welfare states the strict separation of the private and public sphere is not achievable as the members of society can only accomplish a subjective gain of liberty by committing themselves even stronger to society (Brunkhorst 2005). Equality as part of equaliberty does not exist as ideal separation of private and public sphere; in addition, liberty as part of 'libertyequality' must not degenerate to 'equality of safety' as democratic liberty. Bourgeois society of the modern world is constantly confronted with these contradictions. Overcoming them is part of the concept of equaliberty.

However, at the same time, the concept of equaliberty entails the optionality and potentiality of future, in the sense of liberty and equality as democracy and equality, even though the circumstances of Bourgeois society frequently impede this. Put in terms of the inherent logic of the concept of equaliberty: optionality and potentiality of future means that there is hope that democracy and equality can eventually come together – but only in case that the current circumstances are not understood as natural and hence insurmountable, but as historically and socially constructed and hence alterable. This can be seen in the historical constellation of the 21st century (for more details, see chapter 3): There is every indication that the current constellation is increasingly characterised by a "post-democratic" dynamic (Rancière 1995/2000).

However, as long as the *δῆμος* (*demos*) does not signify the actual democratic foundation of decision-making and hence the prevalent power relations are only stabilised by the construction of an outer sphere, i.e. people who do not belong and do not possess the same rights, the concept of equaliberty purely remains a historical ideal. The current constellation even tends to question the concept of equaliberty itself, thereby contesting the notion of optionality and potentiality of future, and how it defined Bourgeois society despite all the historical faults of inequality and bondage (Adorno/Horkheimer 2002). In the following this line of argumentation will be further discussed from an educational science and social work theory perspective that seeks to address the realisation of the concept of equaliberty in a specific way.

2 Paedagogical and educational contributions to the politics of equaliberty

The public guarantee of education (and care) has been politically discussed and increasingly been implemented by welfare states since the end of the 18th or the beginning of the 19th century. This guarantee reflects the materialisation of the concept of equaliberty in a specific way: Each individual is expected to pursue self-activity, assuming that each individual's capacity to be autonomous implies the ability to be formed (*Bildsamkeit*) – insofar paedagogy in this broad sense is always 'education for liberty (and autonomy)' (Benner 1987/2010, p. 70). At the same time each individual is seen as part of the entirety of society. Each member is expected to feel and act as part of the existing society. Hence, someone's behaviour, opinions and beliefs are always subject to regulative paedagogical demands during social exchange. This especially applies when members of society are confronted with unequal

access and options for action, meaning the proportion of equality and liberty has been compromised in an individual case. Insofar, in the scope of the concept of equaliberty paedagogy (in the broad sense) is always ‘education for equality’ as well (Winkler 1988). Hence, in terms of the concept of equaliberty paedagogy is always both generalised *political education* and *social paedagogy*, also in a broad sense. Its task is to enable individuals to be citizens (political education) and to give assistance to people on an individual case basis (social paedagogy).⁵

Considering this twofold paedagogical challenge, realising a *political philosophy of education*: this means a systematic reflection of education on the logic of equaliberty understood as ‘libertyequality’ in the context of paedagogy; and realising a *political economy of education*: educational science is responsible for the systematic reflection of the conditions of (re-)production of education.

The execution of this task is inevitably always subject to the current social, cultural and economical conditions. Therefore the contribution of educational science to the realisation of the concept of equaliberty depends on whether the discipline participates in the examination of a policy of equaliberty in respect of optionality and potentiality of future or whether it sticks to the “conservative” basis structure of paedagogy (Bernfeld 1925/1973, p. 119; own translation).

Optionality and potentiality of future as an expression of the concept of equaliberty can only become relevant and action-guiding if its structural limitations are reflected continuously in educational science and are considered in everyday paedagogical (inter)actions (including e.g. caring). Educational acting and its scientific reflection are also confronted with the constellation of the national welfare state in its capacity of an ‘exclusive guarantor of equality’ – as the welfare state does not question the distribution of property which constitutes a reason for the existing conditions of inequality, similar to the democratic theory dilemma that ‘libertyequality’ can easily become an ‘equality of safety’. These limitations of the concept of equaliberty illustrate tensions that must serve as a starting point for the development of a policy of equaliberty. Hence they must also serve as a starting point for paedagogy’s contribution to the issue at hand and for educational science’s reflections.

Therefore paedagogy and educational science can only contribute to the realisation of equaliberty if they participate in the examination and discussion of a policy of equaliberty. In principle these disciplines have always been part of the realisation of the concept of equaliberty through their actions. However, they can only live up to the expectations attached to this challenge if they clearly position themselves within the discussion on the concept of equaliberty. For example, this can be seen in the educational science’s struggle to determine the relation between the paedagogical and the political (Casale/Koller/Ricken 2016) or in the discussion on whether educational policy should be understood as an element of social policy (Krüger/Sünker 1999) or whether one should aim for educational science that is independent of social policy (Reichenbach 2016). These points have been discussed in educational science in Bourgeois society for a long time – since the Enlightenment educational science is

⁵ The individual case is characterised by the fact that children are not sufficiently protected or even threatened while growing up – hence the education of human beings as citizens cannot be effective. In terms of welfare legislation one refers to the necessity of warranty of child’s well-being or to its endangerment in these situations, as the largest field of work of social work and social paedagogy in Germany, i.e. the youth welfare sector, illustrates.

confronted with the question of one's position and way of contribution in respect to the realisation of the concept of equaliberty.

However, in times of „the great regression” that we have been experiencing for a couple of years (Geiselberger 2017, p. 9, own translation), i.e. in a period of “falling behind a level of civilisation that was thought to be incircumventable”, the question of a policy of equaliberty becomes even more relevant. The examination of the contradictions that characterise a policy of equaliberty per se results in challenging the concept itself. Challenging one of the two dimensions entails contesting the concept of equaliberty itself (Balibar 2010/2012, p. 94). And this is precisely the conclusion that is advocated for in this paper: The concept of equaliberty as a promise of Bourgeois society has been in the midst of a crisis in recent times. We are in a situation where merely seeking the realisation of the concept of equaliberty is not enough anymore. Therefore a decision needs to be made (Koselleck 1973, p. 105) to secure the survival of the concept itself. Only then the optionality and potentiality for the uncovering of a future that is characterised by democracy and equality can be exhausted once more.

Paedagogy and educational science could play an important part in this ‘rescue mission’ provided that the discipline recognises that educational acting must be conceptualised and realised as both *generalised political education* and *social education*; and that a *political philosophy of education and a political economy of education* have to be advocated.

The following section illustrates possible starting points for this countermovement to the current developments by outlining an analysis of the current developments and offering potential solutions.

3 Paedagogical perspectives in the face of the current challenges of equaliberty

The current great regression is characterised by different aspects of decivilization. Bourgeois society itself and its concept of equaliberty is being challenged (Rosanvallon 2011/2017). Paedagogical acting in the form of an education for liberty and an education for equality cannot naturally rely on the public guarantee of these actions anymore. Even worse, their legitimisation itself might be fundamentally challenged. This leads to a disruption of the former understanding of the nature of the democratic ideal (Rosanvallon 2011/2017, p. 12) and challenges the idea of the equiprimordial nature of equality and liberty in the welfare and national state's shaping. This development is reflected in the current radicalisation of social inequality.

As shown above, the promise of the welfare state has been to offer equality exclusively to the members of the national state (Rose 1996; Bohlender 2007, p. 31). This assurance has never led to universal equality. Nevertheless, the promise and therefore the option and the potential of equality was introduced and a specific level of redistribution has been achieved. However, in the last couple of years the promise of equality has not only been limited by the national state's frontier (citizenship), but also within the “community of citizens” itself (Rosanvallon 2011/2017, p. 19; own translation).

Like in feudal times people are stuck in their daily struggle for survival: Hundred thousands of people face this harsh reality in Germany alone in the 21st century. Due to a lack of income or excessive indebtedness individuals cannot participate as customers in the primary market economy anymore, but depend on donations from a secondary circulation of goods (like food markets). In the shadow of the welfare state a new charity economy has been established (see Kessl/Lorenz/Schoneville 2020), which provides people in need with donated basic goods

such as food and clothes, mostly in the form of charitable handouts or in return for a symbolic amount. The users are not entitled to these goods, but depend on the good will of others. However, the existential fight for survival and the essential support that is provided in the global south differs from that new one in the global north. This can be seen in the fact that this poverty relief is mostly conducted by welfare state organisations and is therefore tied to an institutionalised structure of social services (Kessl/Oechler/Schröder 2020). Nonetheless, the establishment of this new charity economy has led to a structural logic of exclusion that exceeds the structural limitations of the welfare state's promise of equality as a result of the concept of private property, especially because this new charity economy's implementation is bound to the institutionalised welfare state's care structures. The concept of private property has admittedly always legitimised unequal circumstances. Nonetheless, it kept the idea of equality as necessary opponent to (political) liberty alive. Due to the establishment of this new differentiation between the inner and the outer sphere within the national state i.e. between consuming citizens and users of the new economy of compassion who depend on the good will and donations of others, this idea has fallen into oblivion. In the light of this development the current success of nationalistic and chauvinistic ideologies is hardly surprising.

However, in my opinion, this rise of a new charity, which is directly connected to the fields of education and care, is a symptom of the questioning of equaliberty in the current days. Not only liberty and equality, but also education for liberty and education for equality are bound by a dialectical relation: Historically, one thing is inconceivable without the other in Bourgeois society. However, this dialectical relation is currently negated. Both an education for liberty that is not fundamentally bound to equality anymore, and an education for liberty that is not bound to the concept of liberty anymore subvert this relation. Unfortunately this is exactly the dynamic that can be observed when education for liberty leads to multiple projects of 'participation' - at school or in a youth welfare service, where the conditions of political participation are not considered anymore. For example, under what conditions students can participate in these projects is not taken into account. This limited education for liberty turns into a staging of seemingly political participation without consideration of the current social circumstances. Conversely, education for equality which is not bound to an education for liberty anymore merely serves as a regulation of behaviour that is not tied to the promise of political participation.

Or even worse: education for equality turns into poverty relief, which can be seen in the context of the new charity economy.

Members of society are confronted with an education programme which forces them to embrace a situation that is characterised by radical exclusion. Individuals have to accept the conditions that arise due to insufficient transfer income and daily use of donations. Members of society thereby lose their prospect of being both human *and* citizen and politically, the concept of equaliberty is abandoned. The pressing task for educational science is to analyse the political, cultural and economical qualities of these developments which means the creation of an updated *political philosophy of education and a political economy of education*. The challenges of the concept of equaliberty can only be faced if the public guarantee of human agency as a condition of political liberty and the assurance of political autonomy as the goal of social equality are once again conceived as fundamental orientation basis. Paedagogy and educational science are obliged to make a contribution to this.

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Author's Address:

Fabian Kessl

Professor for Social Pedagogy at the University of Wuppertal (GER).

fabian.kessl@uni-wuppertal.de