

OPERATIONALIZATION OF SOCIAL EXCLUSION & INCLUSION

Definitions, dimension, indicators and discourses.



DEFINING SOCIAL EXCLUSION & INCLUSION

... is difficult

- Meanings vary
- Meanings are shifting

→ complex settings indicate that approaches towards social exclusion/inclusion are **(country-) specific** and **context-dependent** (history, discourse, public policies, institutions, cultural understanding of social relations, etc.)



VARIETY OF DEFINITIONS OF EXCLUSION

- *“Social exclusion may be understood as an accumulation of confluent processes with successive ruptures arising from the heart of the economy, politics and society, which gradually distances and places persons, groups, communities and territories in a position of inferiority in relation to centres of power, resources and prevailing values” (Estivill 2003, p 19)*
- *“the dynamic process of being shut out ... from any of the social, economic, political and cultural systems which determine the social integration of a person in society” (Walker and Walker 1997, p 8)*
- *”lack of income and productive resources to ensure sustainable livelihoods; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increased morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments and social discrimination and exclusion. It is also characterised by lack of participation in decision-making and in civil, social and cultural life.” (United Nations, 1995, p 57)*
- *“inability to participate effectively in economic, social, political and cultural life, alienation and distance from the mainstream society” (Duffy 1995)*



DIMENSIONS OF SOCIAL EXCLUSION AND INCLUSION

- Economic activities
- Social activities
- Political activities

...discussions might go even further...

- Community
- Individual
- Group
- Spatial



Dimensions of social exclusion and inclusion, social policy areas

Social Exclusion		Social Inclusion	
Areas	Indications	Prerequisites/ conditions	Social Policies
<i>Economic Activities</i> -consumption	-poverty -material deprivation	Resources – redistribution: -income -other resources -housing	-income assistance -social services -housing assistance
-activities in labour market	-(un)employment -job quality	-flexibility -approach (equal opportunity principle + social capital) -skills/capabilities (human capital)	-job supply -anti-discrimination measures -positive discrimination -active employment policy -life-long education -social services
<i>Social Activities</i>	-(non) participation in social networks -limited quality and width of networks/ contacts	-social contacts and networks -quality of contacts and networks -trust in other people	-social work -prevention against isolation -empowerment, fellowship/participation, partnership
Political Activities	-(non)participation in political activities – eg. elections, organisations	-trust in institutions -legitimacy of political systems and representatives	-access to realisation of political and civil rights -recognition policy

Source: Mareš, P. and Tomáš Sirovátka. 2008. “Sociální vyloučení (exkluze) a sociální začleňování (inkluzie) – koncepty, diskurz, agenda.” *Czech Sociological Review* 44 (2): 271-294.



INDICATORS OF SOCIAL EXCLUSION

- Multidimensional phenomenon
- Need for set of indicators
- Depending on meanings and discourses, nature and understanding of social exclusion/ its causes



LEVELS OF DEPRIVATION

1. Indicators capturing basic needs

- **Material deprivation**
 - Income deprivation
 - Deprivation in basic needs (nutrition, clothing, vacancy/holiday)
 - Deprivation in housing (housing conditions, infrastructure)
- **Health deprivation**
- **Deprivation in social contacts**



LEVELS OF DEPRIVATION

- 2. Complementary indicators
 - Participation in political and social/cultural events/life of the society
 - Access to institutions influencing life chances (schools, social services, banks, theaters, ecc.)



USED INDICATORS OF SOCIAL EXCLUSION

Level one

1. The risk of financial poverty as measured by 50% and 60% of national median income (is the amount that divides the income distribution into two equal groups, half having income above that amount, and half having income below that amount)
2. Income inequality as measured by the quintile share ratio, ie the ratio of the share of national income received by the top 20% of households relative to the bottom 20% of households
3. The proportion of those aged 18-24 with only lower secondary education (and not in education or training)
4. Overall and long-term unemployment rates measured on ILO basis.
5. Proportion of population living in jobless households
6. Proportion of population dying before the age of 65, or the ratio of those in bottom and top income quintile groups who classify their health as bad or very bad on the WHO definition
7. Proportion of people living in households lacking specified amenities or with specified housing faults



USED INDICATORS OF SOCIAL EXCLUSION

Level two

1. Proportion of persons in households below 40% and below 70% of median income, and proportion below 60% of the median fixed in real terms at a particular date
2. Value of 60% of median threshold in purchasing power standards for one- and four-person households
3. Proportion of the population living in households permanently at risk of financial poverty
4. Mean and median equalized poverty gap for a poverty line set at 60% median income. (This measures depth of poverty by calculating the extent to which those in poverty fall below the poverty line.)
5. Income inequality as measured by the decile ratio and the Gini coefficient
6. Proportion of the population aged 18-59 (64) with only lower secondary education or less
7. Proportion of discouraged workers, proportion non-employed and proportion in involuntary part-time work, as a percentage of total 18-64 population excluding those in full-time education
8. Proportion of people living in jobless households with current income below 60% median
9. Proportion of employees living in households at risk of poverty (60% median)
10. Proportion of employees who are low paid
11. Proportion of people unable to obtain medical treatment for financial reasons or because of waiting lists
12. Proportion of the population living in overcrowded housing
13. Proportion of people who have been in areas on rent or mortgage payments
14. Proportion of people living in households unable in an emergency to raise a specified sum



FURTHER FOCUS ON...

- Development of other **sets of indicators including wider range of dimensions** of social exclusion
 1. Non-monetary indicators of deprivation
 2. Differential access to education
 3. Housing of poor environmental quality
 4. Housing cost
 5. Homelessness and precarious housing
 6. Literacy and numeracy
 7. Access to public and essential private services
 8. Social participation and access to internet
- Conceptualisation of **subjective (material) deprivation**



DISCOURSE OF SOCIAL EXCLUSION

Differences

- Priority of aims
- Understanding of the exclusion
- Approach to inclusion
- Definition of boundaries
- Solutions of exclusion
- Presentation of relationship between inclusion and exclusion

Common features

- Ideal types
- Work as a major factor in inclusion
- Moral content



PROBLEMATIC FORMULATION OF POLICIES

- term still quite new
- concept is very flexible (country, context-specific)
- missing a well-developed set of indicators
- clarifying the definition and the concept would undermine the flexibility of the concept

Any other potential problems?

