

## Social Exclusion and Its Linkage to Poverty, Inequality and Gender Oppression in Developing Country Context: A Preliminary Review

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***Abstract:** This paper attempts to review the linkage between the concept of social exclusion and poverty, inequality and gender oppression in developing country context. 'Social Exclusion' as a concept was originated in the developed West to explain from poverty, unemployment to institutional discrimination in welfare states which now extended to address poverty, inequality and discrimination prevailing in developing countries. The review highlighted that 'social exclusion' is a contested term which sometimes confusing and problematic to address poverty in developing countries. Further, the concept does not successfully address dimension of inequality, discrimination and oppression exist in developing countries like Bangladesh and India.*

### Introduction

In the early 1970s the concept 'social exclusion' appeared. It means exclusion from the 'norms' as defined by the industrialized West. The governments of developed countries now increasingly use this concept of 'social exclusion' to address a range of problems from poverty and unemployment to gendered inequalities and institutional racism. Social policy planners and development scholars are also using this concept to address the existing poverty situation in the developing countries. The measurement criteria for social exclusion applied in the developed West are based on its norms. Hence, the excluded are minorities in the developed countries while they are large majorities in the developing ones. Therefore, one can argue whether the concept 'social exclusion' is useful to address the existing poverty, inequalities and gender oppression in developing countries. This

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article attempts to preliminary review of literature on social exclusion.

### **What is Social Exclusion?**

The term 'social exclusion' originally coined in France by Lenoir (1974) referred to "various categories of people labeled 'social problems' and who were unprotected by social insurance" (Gore and Figueiredo, 1996:9). Considering the French Republican tradition on solidarity social exclusion is primarily defined as the 'rupture of a social bond- which is cultural and moral- between the individual and society' in which national solidarity implies political right and duties. So, the poor, unemployed and ethnic minorities are considered as outsiders (de Haan, 1999). European Foundation (1995:4) sees social exclusion as 'the process through which individuals or groups are wholly or partially excluded from full participation in the society in which they live' (quoted in de Haan and Maxwell, 1998:2).

According to Burchardt et al. (1999:229) 'An individual is socially excluded if (a) he or she is geographically resident in a society but (b) for reasons beyond his or her control he or she cannot participate in the normal activities of citizens in that society and (c) he or she would like to so participate'. Barry (1998) further suggests that the groups may be considered socially excluded if denied the opportunity to participate whether they desire or not.

Silver (1995:60) views that 'people may be excluded from: a livelihood; secure, permanent employment; earnings; property, credit, or land; housing; minimal or prevailing consumption levels; education, skills, and cultural capital; the welfare state; citizenship and legal equality; democratic participation; public goods; the nation or the dominant race; family and sociability; humanity, respect, fulfilment and understanding'.

Silver (1995) also identifies three paradigms to the analysis of social exclusion. The first one is *solidarity paradigm*, founded in French ideas about social solidarity. 'It focuses attention on

exclusion inherent in the solidarity of nation, race, ethnicity, locality and other cultural or primordial ties that delimit group boundaries' (p.67). The second paradigm is *specialization paradigm*, dominant in the US and perhaps UK, where exclusion is tied to notions of discrimination. Here 'exclusion is considered a consequence of *specialization*: social differentiation, economic division of labour, and the separation of spheres. It assumes that individuals differ, giving rise to specialization in the market and among special groups' (p.67). The third and final paradigm is *monopoly paradigm*, dominant in Western Europe, in which exclusion is associated with formation of group monopoly. This paradigm views 'the social order as coercive, imposed through a set of hierarchical power relations...exclusion entails the interplay of class, status and political power and serves the interests of the included' (p.68).

Burchardt et al. (1999) conducted a research on Britain. They identify five activities to consider normal for the society-

- a) **Consumption Activity:** minimum consumption of food, goods and services normal for the society.
- b) **Savings Activity:** accumulating savings, pension entitlement or owning of property.
- c) **Production Activity:** engaging in economically and socially valued activities e.g. paid work, education and training.
- d) **Political Activity:** including voting, membership of political parties and of national or local political campaigners.
- e) **Social Activity:** interaction with family and friends, identifying in the cultural group or community.

Levitas (2000:364-66) develops three approaches for social exclusion: redistributive discourse (RED), social integration discourse (SID) and moral underclass discourse (MUD). RED sees social exclusion as a consequence of poverty. Labour-force attachment is the key element of SID 'in which paid work represented as the primary or sole legitimate means of integrating individuals of working age into society. The lead indicator of

social exclusion for RED is low income, while for SID it is unemployment or 'economic inactivity'- a concept that intrinsically denies the value of unpaid, non-market work. MUD emphasizes moral and cultural causes of poverty. It focuses on the consequences of social exclusion for social order, emphasizing particular groups, such as unemployed and potentially criminal youngsters, lone parents, especially young unmarried mothers. On the basis of what the poor chiefly lack, the three approaches can be simplified in such way that in RED poor have no money, in the SID they have no work and in MUD no morals.

### **Social Exclusion in Developing Countries**

The idea of 'social exclusion' gradually diffused from the West to developing countries through United Nations agencies. The measurement criteria for social exclusion applicable in the West are based on its social norms. Thus the excluded are minorities in developed countries while they are majorities in developing ones. Now, question may arise whether the measurement criteria of social exclusion applied in the developed West is equally applicable for developing countries or 'social exclusion' as a concept is itself useful in the developing countries.

Bangladesh, for example, like other developing countries, has a history, magnitude of insecurity, administrative resources and budget constraints quite different from developed countries. Bangladesh is the ninth populous and third densely populated country in the world. According to Bangladesh Bureau of Statistics (BBS, 2005): labourforce participation is 54.9 million in which 11.2 per cent are child labour; per capita income is US\$361; average daily calorie intake is 2240 kilocalorie per person; average per day per person protein intake is 63 grams; person per hospital bed is 4109; person per physician is 4043; literacy rate (above 7 years) is 45.3 per cent; mortality rate (MMR) is 3.9 per 1000 live births; infant mortality rate (IMR) is 53 per 1000 live births; agro-based labour market is unorganized and non-formalized. Considering the concept 'social exclusion' in the context of Bangladesh, it is found that most of its people are socially excluded. Gore and Figueiredo (1996) therefore argue

that social exclusion can be life threatening in poorer countries, rather than entailing the loss of acquired rights, and as such, may be more connected to absolute poverty.

### **Social Exclusion and Poverty**

The concepts of social exclusion and poverty are contested and sometimes overlap. 'At one extreme, social exclusion can be seen as an element *within* a narrow definition of poverty in terms of the minimum standard of living below which one is absolutely poor...At the other extreme, social exclusion can be seen as a *replacement* for poverty' (Gore and Figueiredo, 1996:12, emphasis original). Broadly, two main approaches are used in defining poverty (de Haan, 1998, and Bhalla and Lapeyre, 1997): (a) Income based measurement which includes basic needs approach, absolute poverty approach and relative deprivation (Townsend, 1993); and (2) Alternative measurement includes Human Development Index (HDI), capabilities and entitlement approach (Sen, 1999), and vulnerability (Chambers, 1989). The World Summit on Social Development also gives an overall definition in which social exclusion is seen as a manifestation of poverty:

*Poverty has various manifestation, including lack of income and productive resources sufficient 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 characterized by a lack of participation in decision-making and in civil, social and cultural life. It occurs in all countries: as mass poverty in many developing countries... (UN, 1995:57).*

Studies on social exclusion show different relationship between material poverty and social exclusion (Gore and Figueiredo, 1996). In *Russia* and *Tanzania*, material deprivation in

consumption and possessions is one aspect of social exclusion. In *Thailand*, social exclusion is explicitly regarded as something different from poverty. In *India*, 'poverty is identified as an important cause of social exclusion because purchasing power acts as a barrier to the realization of welfare rights...More than from exclusion, poverty results from unjust and uneven terms of inclusion' (p.13). Peru sees social exclusion as a cause of poverty; and in a Yemen study observes interdependent relationship between poverty and social exclusion. They further opine that 'Institutions are important in processes of social exclusion as they structure the relationship between macro-economic change and the pattern of economic growth on the one hand, and the changing life-circumstances of individuals, households and groups, on the other hand' (p.15).

### **Gender and Social Exclusion**

In developing countries, gender-based exclusion focuses on exclusion from land rights and common property resources, employment opportunities, income, knowledge and information. 'Women are frequently differently situated subjects who may be disenfranchised through descent systems, and faced by marriage systems which raise both practical problems of land management, related to patrilocality and distance from villages where land rights are located, and of access to labour to make productive use of land, and by ideological problems, for example like arguments that dowry is pre-mortem inheritance' (Jackson, 1999:140). UN World Summit 1995 also recognized that women and children are vulnerable to stress and deprivation.

*Poverty, unemployment and social disintegration too often result in isolation, marginalization and violence...the majority of whom are women, have very limited access to income, resources, education, health care or nutrition, particularly in Africa and the least developed countries...More women than men live in absolute poverty and the imbalance continues to grow, with serious consequences for women and their children. Women carry a*

*disproportionate share of the problems of coping with poverty, social disintegration, unemployment, environmental degradation and effects of war (UN, 1995: 6-7).*

Considering gender, Kabeer (2000<sub>a</sub>) sees political-economy dimension is the key structuring principle of labour, property and other valued resources in a society. 'It structures the division between productive and reproductive labour giving women the primary responsibility for the latter. It structures an unequal distribution of land and property in many societies so that women either receive no rights to property, fewer rights than men or else their entitlements are mediated by male family members. It also structures the labour market, generally assigning men to higher-paid, formal sector and managerial positions and women to lower-paid, casual work, often in various forms of self-employment' (p.85)

She further argues "gender also encompasses elements of injustice which stem from the dominant values of a society. The devaluation of women is expressed in the 'range of harms' that they are found to suffer in different societies, including trivializing, disparaging and demeaning representations of things coded 'feminine'; attitudinal discrimination, sexual harassment, domestic violence and denial of full citizenship rights" (p.85).

Social exclusion is more complicated when we see both exclusion and inclusion occur simultaneously. Jackson (1999) sees binary and polarized formulation of inclusion and exclusion are problematic. She argues that 'it suggests a unitary notions of poverty in which the included are powerful and the excluded are powerless, rather than one in which power is dispersed, contingent and unstable... Gender relations are not usefully conceptualized as exclusionary process in terms of power since social closure is partial, contested and contingent... Gender identities of women are positive, and valued by women, at the same time as they may be devalued in hegemonic ideologies... Gender difference is an issue of social recognition and valuation, and not simply a social problem' (p.132-33).

Religion, purdah, caste are often see as sources of exclusion and inclusion. Marriage in relation to religion and caste is one area in which both inclusion and exclusion can occur simultaneously. In South Asia, particularly in Bangladesh, if a Muslim woman marries a non-Muslim man, she may be excluded from her familial and social relationship. At the same time she can be included within the new kinship relationship. Caste system in India is also a location of inclusion and exclusion. Further, exclusion on the basis of caste is fixed at birth and is hence inflexible (Nayak, 1995).

Purdah has often excluded Muslim women from labour market although these women are not necessarily poor. On the other hand women maintain purdah for their security and social and familial inclusion. In contrast, poor women often break the purdah norm and enter into paid work, for example, the garment sector in Bangladesh. Cain et al. (1979) in the context of purdah system in Bangladesh illustrates the mutuality of claims and obligations, power and responsibility:

*Purdah is a complex institution that entails much more than restrictions on women's physical mobility and dress. It denies women access to many opportunities and aspects of everyday life and at the same time confers upon them social status as protected group. Thus, in theory, purdah both controls women and provides them shelter and security. While men have power and authority over women, they are also normatively obligated to provide them with food, clothing and shelter.' (p.408 quoted in Kabeer, 2000b:41)*

Incorporating the notion of rights in 'social exclusion' we can see exclusion from right to free speech, religion or the right to have a secure childhood. For example, in South Asia, specially in India and Bangladesh, due to poverty children enter labourforce that cause exclusion from their rights to education in one hand, while



this child labour contribute to their families' livelihood on the other hand.

This paradox of inclusion and exclusion, as Jackson (1999:129) argues, 'is largely missing from social exclusion studies, although it has been central to gender analysis since the 1970s, as part of an intellectual history in which social exclusion and inclusion have been explored, to some depth'. Dowry is another source of gender oppression in most of rural areas of India and also prevalent in Bangladesh. Nonpayment of dowry results physical and mental torture, divorce and even death. Divorce often excludes the victim from her parents, and death certainly exclude from life. This issue is also mostly missing from social exclusion discourse. Development interventions may also sources of exclusion are overlooked in social exclusion studies. Ester Boserup (1970) in her seminal study *Women's Role in Economic Development* on Sub-Saharan Africa pointed out that development schemes excluded women from their traditional agricultural role 'because they did not get access to new technologies and training provided by colonial administrators; in other words that women were progressively excluded in the modernization process' (de Haan, 1995).

Janice Boddy (1989:140) in her study on Sudan, argues that 'if men are central and women peripheral with respect to Islam and external relations, women are central and men are peripheral when it comes to physical, social, and cultural reproduction: the worldliness of village life' (quoted in Jackson 1999:133). Jackson (1999) further argues that 'Gendered processes such as definition of wage-work as work, and the neglect of domestic work, are central to the idea that women are socially excluded. The inclusion agenda then suggests that women need to be included, i.e. to become wage workers like men, rather than considering the need to revise the ways in which inclusion is framed, for example, the importance of including men in more reproductive responsibilities' (p.133).

However, women in general, both in developing countries and developed countries, have long been included in the reproductive

sphere from which, as Porter (2000) argues they “can gain a sense of power and inclusion from these activities. But it is as a consequence of this inclusion in the reproductive sphere that women are simultaneously ‘excluded’ from the productive sphere” (p.78).

### **Social exclusion: Debate is still going on**

The debate still continues whether the concept ‘social exclusion’ developed and used in the West useful to address the existing poverty, inequality and gender oppression in developing countries. The relationships between employment, education, opportunity, social exclusion and poverty are central to current policy debates. Tony Atkinson (1998) argues that the concepts of poverty, unemployment and social exclusion are closely related, but are not the same. People may be poor without being socially excluded and *vice versa*. Unemployment may cause poverty, but this can be prevented. Equally, marginal jobs do not ensure social inclusion. De Haan (1998:10) sees it is an useful concept as it focuses on the multi-dimensional character of deprivation, integrating loosely connected notions such as precariousness of work, income, gender, ethnicity and participation. It also emphasizes on processes, mechanisms and institutions that exclude people and looks on causes rather than static description of deprivation. It further ‘has policy relevance, since it identifies problems in existing institutions and options for improvement’. For Clert (2000:176) *the adoption of social exclusion entails changes in the mainstream development paradigm because of its semantic power and the goals of social justice, diversity and rights protection which it sets out for anti-poverty strategies to pursue*’.

Jackson (1999), however, argues that social exclusion misses gendered dimensions of poverty and groups race, gender, class and disability together which is wrong as these groups face different problems in their experience of poverty and exclusion. Gender equality in its own right is again ignored in social exclusion. It is also crucial that definitions of exclusion and inclusion are not fully developed in the context of gender. Grant, Blue and Harpham (2000:217) argue that ‘Social exclusion should not treated as a blanket term that refers to any individual of group experiencing some form of discrimination or injustice, but rather

as a complex and variable framework that can be disaggregated to reveal multiple exclusionary processes and shades of deprivation’.

Kabeer (2000<sub>b</sub>) considers ‘social exclusion’ as an useful tool and argues that it adds value to understanding of poverty, gender oppression and inequality, she also warns the transferability of this concept and argues that ‘the danger is that given the roots of the concept in northern social policy discourse, it will simply serve to re-label long-standing and locally developed approaches to social problems or alternatively that it will promote a tendency to assess southern realities in terms of the extent to which they converge or diverge from some standard northern model’ (p.83).

She further contends that ‘a social exclusion perspective opens up a larger and more complex domain of disadvantage for policy-makers to grapple with than does the conventional focus on poverty. It adds concerns of social inequality to longstanding concerns with poverty and it draws attention to the importance of respect and recognition in strategies for addressing disadvantage, along with more conventional preoccupations with the technicalities of needs identification and service delivery’ (p.94)

### **Conclusions**

The above discussion indicates that the concept ‘social exclusion’ is itself problematic and sometimes confusing. Since in the developed West, social integration is institutionalized and fairly clearly defined exclusion from the ‘norm’ can easily be understandable. While in developing countries, it is quite difficult to define what is ‘normal’. Further, social exclusion presupposes social inclusion. Exclusion in the sense of poverty is clearly relevant in welfare states, because due to the crisis of welfare state people are excluded from their rights that were earlier provided by the state. While for developing countries, for example in South Asia, this type of exclusion is not relevant because people of these countries have not been provided with basic security. Therefore, ‘social exclusion’ concept developed in the Western developed countries, to some extent, is problematic to apply in developing countries. Hence, measurement criteria for ‘social exclusion’ applicable for developed countries need to reshape to readdress and redefine the poverty, inequality and gender oppression

encounter by the people of developing countries. It is also important to consider Kabeer's (2000<sub>b</sub>) view that despite its origins in northern social policy discourses, the concept of social exclusion can add value to attempts to think about social policy in the context of development if it can provide a unifying framework for analysing the social implications of economic disadvantage and the economic implications of social disadvantage.

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