


## Social inclusion and social exclusion: A necessary conceptual discussion

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### ABSTRACT

Society, historically, experiences several social processes, including social inclusion and social exclusion. Complex concepts that help understand social, economic, political and cultural inequalities. It is understood that the interpretation of these concepts in a broader way is necessary to effectively develop inclusive actions and to alleviate exclusionary processes, seeking social justice. Therefore, this study aims to discuss the mechanisms, processes and consequences of social inclusion and social exclusion in contemporary social reality. Regarding methodology, a qualitative and descriptive approach was chosen, with data collection based on bibliographical research. It is concluded that debating the processes of social inclusion and social exclusion in contemporary society shows that in addition to the complexity intrinsic to social dynamics and the challenges faced by different groups and individuals, the aforementioned concepts are polysemic and their discussion occurs historically, since relationships social conditions permeate the existence of humanity.

**Keywords:** Social Inclusion, Social exclusion, Social justice, Social differences.

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## INTRODUCTION

Social inclusion and social exclusion are two essential concepts in the social sciences, as they permeate discussions and analyses of contemporary social structure and dynamics. Understanding this concept is key to understanding the social, economic, and political inequalities that constitute the relationships between individuals and groups in society.

Social inclusion refers to the process of ensuring the full and equal participation of all individuals who make up society in different aspects of life, such as access to quality education, social rights, cultural perpetuation, economic development and political action. According to Sen (1999), social inclusion is an ethical imperative that needs to eliminate the barriers that marginalize certain social groups, seeking to promote equity and social justice. From this perspective, policies and programs that aim to promote social inclusion seek to reduce inequalities and promote the effective participation of all citizens in life in society.

On the other hand, social exclusion is the condition of marginalization and isolation faced by certain groups or individuals who have their basic rights curtailed. According to Castel (1995), social exclusion is a multifaceted process that manifests itself in different spheres of social life, causing socioeconomic, political and cultural marginalization. This process is not limited only to material restriction, but also encompasses the denial of recognition and belonging of individuals or groups, a circumstance that can affect the identity and self-esteem of the excluded.

In this sense, this research aimed to discuss the mechanisms, processes and consequences of social inclusion and social exclusion in the contemporary social reality. By interpreting the proposed concepts, it is estimated to contribute to the development of more inclusive and equitable discussions.

For the development of this research, it was decided to follow a qualitative and descriptive approach, since there is no intention to quantify, but to theoretically discuss the bases of the concept of social inclusion and social exclusion. The information was collected from the bibliographic research, seeking to discuss the concept in a more in-depth way.

## SOCIAL INCLUSION AND SOCIAL EXCLUSION: POLYSEMIC CONCEPTS

The discourse around social inclusion derives from the idea of social exclusion. It is necessary to emphasize that inclusion is not limited to the simple binomial "those who are not included are excluded", because although the excluded is pointed out as "the one who is outside", the process of exclusion cannot be analyzed only from this perspective of being outside/being inside or inside/outside. Both situations are always relative and unstable, as the social boundaries that limit exclusion and inclusion are not fixed, they move, have distinct forms and unimaginable dimensions (Nascimento and Costa, 2015), making social exclusion something complex and difficult to define.



The beginning of the conceptual discussion of exclusion is attributed to René Lenoir, through his 1974 work, *Les exclus. Un français sur dix* (The excluded: one in ten Frenchmen). This text drew attention to the exclusion of certain social categories in the expansive economy in France, which had approached full employment. In this context, the elderly, the physically handicapped and the socially "maladapted" were excluded from a society that had managed to overcome poverty, in its economic criteria (Estivil, 2003; Teixeira, 2007).

Thus, social exclusion had as its reference the European society, especially the French, with the development of the Welfare State, in which the State becomes responsible for the needs of social reproduction, which was considered as an individual responsibility. However, this new perspective did not mean the redistribution of social wealth, but the possibility of raising a social level. This accountability of the state was the main contribution of social democracy in the first world and resulted in the construction of the legitimacy of the struggle of social movements (Sposati, 1998). People who did not attain the status of citizenship with universalized rights (civil, political and social) were considered excluded. The origin of social exclusion lies in the growth of homelessness, the growth of poverty, precarious working conditions, unemployment and the difficulty of young people entering the labor market (Rogers, 1995; Sposati, 1998; Teixeira, 2007).

However, the quest for social equality has been unable to end the exclusion intrinsic to the capitalist mode of production "since it is increasingly evident that full employment is incompatible with the process of accumulation." Thus, "the impossibility of universal employment is the first great and universal manifestation of social exclusion under capitalism" (Sposati, 1998, p. 02).

In this sense, Serge Paugam, in the 1990s, proposed the concept of social disqualification for the analysis of exclusion. According to the author, social disqualification is a process that "characterizes the movement of gradual expulsion from the labor market, of increasingly numerous layers of the population – and the experiences lived in the care relationship that occurred during the different phases of this process" (Paugam, 2001, p. 68).

This process consists of three stages: fragility, dependence, and the rupture of social bonds. The fragility derives from the difficulties of professional integration of individuals who do not receive assistance from the State. This can develop into dependence, the second stage. In turn, this is characterized by professional insecurity, which results in the reduction of economic resources and, consequently, generates the degradation of living conditions, forcing individuals to seek social assistance from the State. These two stages of the process result in the weakening of social bonds. Individuals, seized by a feeling of humiliation and shame, end up restricting their social life. This situation brings us to the third stage of the process, the rupture of social bonds. At this point, state assistance ceases and there is an accumulation of difficulties resulting from growing marginalization, thus preventing social integration. It is at this stage that the feeling of uselessness for society can



increase and hope can be lost, promoting situations of escape, such as, for example, alcoholism (Paugam, 2001).

Robert Castel initiates this debate from the precariousness of work in contemporary society and defines the concept of exclusion as social disaffiliation (Teixeira, 2007, p. 79). "Social disaffiliation is not necessarily the equivalent of a complete absence of bonds, but the absence of inscription of the subject in structures that have a meaning" (Castel, 1995, p. 416). According to Castel "in contemporary society, characterized by the crisis of the Welfare State, the focus on exploitative relations has been replaced by a focus on exclusion, which defines the distance from the center of society" (Tedesco, n.d., p.5).

In addition, it is important to emphasize that it was during the period in which society was experiencing an economic and social recession, through the neoliberal regulation of 1975, that social exclusion, as a concept, is affirmed, characterized "as a concept/denunciation of the rupture of the notion of social and public responsibility built from the Second World War, as well as, of the breakdown of the universality of citizenship conquered in the First World" (Sposati, 1998, p. 02).

In this context of ruptures, in the 1980s, there was a reduction of the concept of exclusion to social inclusion and protection, but in the following years the notion of exclusion related to poverty was resumed. In this oscillation of interpretations, in 1991, in the Report of the European Observatory on the Fight against Social Exclusion, this term appeared related to "... the idea of not having access to social rights (...) and sectoral policies (housing, health, employment, education, etc.), a notion closer to that currently used" (Estivil, 2003; Picrate, 2004).

Although there are different interpretations and definitions of social exclusion, Estivil (2003, p. 39) considers that the common point in the various approaches to exclusion is that it is a

[...] an accumulative and multidimensional process that distances and inferiorizes, with successive ruptures, people, groups, communities and territories from the centers of power, resources and dominant values (...). The manifestations of exclusion are related, therefore, to the idea of process.

This process is the result of a disarticulation between the different parts of society, causing a non-participation in the minimum set of benefits that define a full member of this society – the excluded individual (Cies/Ceso I&D, 1998; Capucha, 1998; Rodrigues et al, 1999). Sposati (1998, p. 03) considers that social exclusion directly confronts the conception of universality and with it that of social rights and citizenship, exclusion being the denial of citizenship.

Social exclusion can be religious, cultural, economic and political. And these spheres must be interpreted as articulated, communicative and, in some cases, intertwined. For example, the sphere of economic exclusion inevitably appropriates social, cultural, and political issues, among others (Nascimento and Costa, 2015).



Currently, there is a broader reading of the interpretation of social exclusion, which encompasses the symbolic field beyond the idea that exclusion results exclusively from the problems of socioeconomic inequality (poverty, exploitation and marginalization). Thus, this symbolic sphere is presented from the hostility, social invisibility and disrespect that social stereotypes reproduce in everyday life (Honneth, 1992; Lopes, 2006).

In this case, the individual who has had the ties that connected him with others broken and who has thus been repelled to the margins, where individuals lose visibility, necessity and, practically, almost all of their existence, that is, the "excluded are all those who are rejected from our material or symbolic markets, from our values" (Xiberras, 1993, p. 21).

Social exclusion can be a consequence of the action of a specific group, which seeks to affirm its identity, eventually resulting in the denial of other identities or from the denial of the recognition of equality, rights and even of one's own material goods (Wanderley, 1997; Elias and Scotson, 1997; Nascimento and Costa, 2015).

The "innumerable forms of social exclusion coexist with a more radical latent form of exclusion, which is difficult to express in the Brazilian case, but which persists residually as a kind of societal black hole" (Nascimento and Costa, 2015, p. 93). Authors such as Nascimento (1998) and Buarque (1993) interpret this more radical exclusion as a new form of social exclusion, which arises in the sense of a "separation".

According to Nascimento and Costa (2015, p. 93), "when a social group is subject to being interpreted based on these three characteristics, it becomes subject to elimination". In Brazil, this scenario is characterized, for example, by the actions of "young people who mistreat an Indian because they think he is a beggar or criminal, or when police officers coldly kill supposedly criminal adolescents" (Nascimento and Costa, 2015, p. 94). These characteristics show that social exclusion is composed of factors that are determined through the denial of the chance of equal opportunities. They are: unemployment, devaluation, precarious work, poverty, violence, insecurity, social injustice, social disqualification, educational inequality and lack of access to goods and services (Almeida, 1993; Wixey et al, 2005; Borba et al, 2011).

These various factors of social exclusion "are connected with each other generating a cumulative effect, such as, for example, unemployment is linked to loss of freedom and poverty" (Wixey et al, 2005, p. 16). This process becomes perverse, as it conditions the excluded to create situations that guarantee their own survival through the informal labor market or illegality, for example (Tsugumi, 2006, p. 21).

In addition, in the discussion of social exclusion, it is possible to identify traditionally disadvantaged social categories, which are composed of: the elderly, peasants, the unemployed, minority ethnic and cultural groups, poor single-parent families, people with disabilities, young



people at risk (drug addicts, ex-prisoners, etc.), homeless people, informal workers, women, young people and individuals with chronic diseases. These categories have different degrees of exclusion that condition their vulnerability (Cies/Ceso I&D, 1998; Rodrigues, 1999).

These disadvantaged social categories present us with social exclusion with "a multidimensional breadth that drives a new dynamic of social problems" (Borba and Lima, 2011, p. 226), which are commonly combated by welfare programs that focus on keeping the most vulnerable with a certain level of satisfaction, thus avoiding rebellion and political risks (Tsugumi, 2006, p. 21).

This solution, by means of welfare programs, is considered a mistake by the author Carreira (1996), who states that "measures should be developed to minimize social exclusion through the holistic approach of the factors imposed by the interdependence that characterizes them, to the detriment of the punctual resolution of each problem" (Carreira, 1996 apud Borba and Lima, 2011, p. 227). For Teixeira (2007), social exclusion cannot be analyzed as a process resulting from social differentiation and, consequently, a natural process, which can be resolved through care solutions. According to the author, "the process of exclusion is due to structural factors of contemporary society, requiring knowledge of the social, political and economic context that determines it" (Teixeira, 2007, p. 81).

For the European Commission (COM), the solutions capable of minimizing social exclusion lie in the general structuring of society. It is in the guarantee of the basic and fundamental, that is, in the promotion of employment, education, health and the protection of the elderly (COM, 2003). For Sposati (1999), the proposals for minimizing exclusive processes only seem to make sense if they are focused on the vindication of social and political rights. However, as we have seen, exclusive processes do not recognize citizenship for all. It prevents, even temporarily, a certain group or individual from participating in social relations, from acting and being recognized as a citizen of rights and duties (Sancho, 2007). And this situation can be resolved when one considers that social inclusion is materialized from shared knowledge, social participation, social equality and well-being for all (Sen, 1999).

Social inclusion reveals an active approach to well-being (Sandell, 1998), overcoming the breaking of barriers, since this process requires comprehensive efforts, coming from individuals or social groups, to enhance and outline the conditions for social inclusion (Guerra, 2012). This theme, as well as exclusion, is also polysemic and is generally associated with three theoretical currents: social integration, economic insertion, and social participation (Nascimento and Costa, 2015). These three currents discuss social inclusion, the right to decent work and social participation in decision-making spaces. Such discussions contributed to the construction of the debate on social inclusion.

In this research, social inclusion will be interpreted as the process that seeks to ensure that individuals affected by (in)justices enjoy the right to access the economy, work, culture, natural



resources, political participation and the right to perpetuate their symbology through the recognition and fair distribution of benefits.

This interpretation of social inclusion is based on author Marta Irving, who uses Nancy Fraser's reflection on social justice to create a deeper debate on social inclusion. Fraser (2002) discusses social justice through two biases: the reaffirmation of the sense of recognition and the search for a fair distribution of the benefits of development. According to the author, recognition refers to the breaking of cultural and symbolic patterns that oppress and prevent an egalitarian and integral citizenship, while distribution refers to economic structure and social differences.

The author also argues that: "in the sense of recognition, injustice arises in the form of subordination or false recognition, which translates into cultural domination, non-recognition of rights and disrespect for human dignity" (Irving, 2015, p. 57). And from the perspective of distribution, injustice occurs "in the form of inequalities through maldistribution, not only from a material perspective, but through exploitation, deprivation, and marginalization" (Irving, 2015, p. 57). The reflection on these biases leads us to weave links between social injustice and social exclusion and between social justice and social inclusion, since in order to idealize inclusion it is necessary to understand that social justice must precede it, because without the recognition and fair distribution of benefits, discussed by Fraser (2002), Social inclusion will not develop widely.

From this perspective, it is suggested to add to these reflections the discussion of socio-environmental (in)justice, since exclusive and inclusive processes are also related to environmental issues. In general, socio-environmental (in)justice is understood as a mechanism by which economically and socially unequal societies allocate the greatest burden of environmental damage from development to low-income populations, discriminated social groups, traditional ethnic peoples, working-class neighborhoods, marginalized and vulnerable populations (Ascerald, 2010; Collective Project, 2017). The term socio-environmental (in)justice is in fact born from the overcoming of the limits of the discussion of environmental (in)justice, in which the debate around hazardous waste is transcended, expanding it to issues related to health, sanitation, land use, occupational safety, transportation, housing, in addition to the participation of communities in decisions related to public policies (Collective Project, 2017).

It is understood that social exclusion, in addition to the socioeconomic issues mentioned above, is also manifested through the impediment of social groups affected by socio-environmental (in)justices from accessing conserved natural environments. This circumstance may restrict the productive activities carried out by these groups, since they may depend exclusively on natural resources. Thus, seeking to broaden the notion of social inclusion, it is suggested to add Fraser's (2002) perspective to environmental issues based on the notion of socio-environmental (in)justice.



Based on this understanding, social inclusion is seen "as the struggle for the right to self-represent, to participate in public spaces, to be accounted for, to access conserved natural environments and to be affected by State policies" (Veiga and Lopes, 2011, p.36). It also seeks to be based on the acceptance and appreciation of diversity, cooperation and collective learning, in a process that society, in its most distinct dimensions, adapts in a way where it is possible to include all individuals, who are prepared to play multiple social roles (Guerra, 2012). Social inclusion influences them "to look at themselves and at others from a Platonic division of relationships" (Veiga and Lopes, 2011, p. 126).

However, reservations about this debate are important, since, according to Veiga and Lopes (2011), social inclusion is usually understood as an imperative that is imposed on everyone due to the naturalness that is attributed to it, as it is commonly recognized as an unquestionable principle. According to Veiga and Lopes (2011), this is due to inclusion being interpreted through the notion of an isotropic world, where everything is in static equilibrium and any change is analyzed as a dysfunction, a situation that contradicts the nature of the world. Thus, it is believed that "the natural thing would be for everyone to occupy social spaces equally and, if this does not happen, it is because some, for their own benefit, operated a spurious intervention, an anomalous distribution" (Veiga and Lopes, 2011, p. 128). Therefore, for some authors, inclusion "means restoring a lost natural order, that is, returning to an original state that would be proper to the world and, therefore, to the very nature of human beings" (Veiga and Lopes, 2011, p. 128).

The problem with this type of interpretation is the complete generalization of excluded individuals, who are commonly subjected to the same processes of social inclusion, without understanding their individual characteristics (Veiga and Lopes, 2011). Deconstructing and problematizing social inclusion is necessary and one of the paths for this critical analysis is through Friedrich Nietzsche's theory, which suggests assuming a priori the historical, which will imply abandoning the naturalistic priori, that is, instead of resorting to a supposed naturally inclusive human nature based on an isotropic egalitarianism. It is necessary to analyze all this as a result of social constructions, which, precisely because they are social, are historical, contingent, cultural, political and, therefore, modifiable (Veiga and Lopes, 2011).

Another important point in the debate on social inclusion is the welfare actions of the State that seek to achieve social inclusion through social programs. According to Borba and Lima (2011), contemporary society has distanced itself from the political propositions of social welfare, thus situations of socio-environmental injustice and social vulnerability are weakening society and promoting social exclusion (Castells, 1998; Lopes, 2006; Proença, 2005). And based on these situations, the State, which has the function of combating them, has presented welfare programs entitled social inclusion programs (Kowarick, 2003, p. 69 apud Borba and Lima, 2011, p. 220).





In Brazil, during the mandates of Fernando Henrique Cardoso (FHC), between 1995 and 2002, the word "inclusion" was used intensively in the political and educational vocabulary (Veiga and Lopes, 2011). Initially, in his first term, social inclusion was characterized as an alternative capable of solving several educational problems, such as the difficulties of participation of students with disabilities in school. In his second term, social inclusion gained new proportions, encompassing a broad set of actions aimed at all individuals who have historically suffered discrimination. The following governments, Luís Inácio Lula da Silva (2003/2010) and Dilma Rousseff (2011/2016), maintained and expanded the inclusive public policies created in the FHC government (Veiga and Lopes, 2011).

According to Veiga and Lopes (2011), the discourses of this period, between 1995 and 2011, attribute a natural character to social inclusion and are in tune with the interpretation of the binary inclusion x exclusion. Such a context generates some criticism of the widespread and sometimes inappropriate use of the term "social inclusion".

Authors such as Irving (2015), Sancho (2007) and Nascimento and Costa (2015) state that interpretations and analyses that transcend this binary are fundamental for the development of social inclusion. From this perspective, Irving (2015, p.58) presents some categories of analysis that result from this broader interpretation of social inclusion:

**(a) Political dimension:**

- Citizenship training, in the sense of participation and representation in the public sphere of decision-making;
- Exercise of rights and duties of a citizen;
- Decentralization of power and actions by government agencies in a system of co-responsibility and democratic governance;
- Ability to organize and/or engage politically through social networks;
- Access to quality information to guide the decision-making process.

**b) Economic dimension**

- Opportunities for decent income and insertion in local, national and regional economic dynamics, in the logic of local-global articulation;
- Decent standards of quality of life and economic insertion by the mainstream;
- Access to shared economic benefits from collective actions;
- Enhancement of local priorities in development strategies;
- Access to means of credit via income.

**c) Dimensions of the work**

- Access to jobs recognised by law;
- Job stability;



- Right to education as a means of insertion in the labor market;
- Access to means of credit through work;
- Job satisfaction;
- Quality assurance of the work environment;
- Guarantee of safety at work;
- Sense of fair remuneration for the work done.

**(d) Cultural dimension**

- Ensuring the recognition, appreciation and strengthening of local traditions, values and customs;
- Guarantees of protection and conservation of historical, artistic and cultural references;
- Opportunities for exchange with other cultures;
- Recognition and affirmation of cultural diversity as a premise of an open society;
- Access to quality leisure opportunities;
- The right to the expression of religiosity and spirituality in all its forms;
- Guarantee of recognition and respect for differences;

**(e) Environmental dimension**

- Ensuring access to a healthy environment;
- Guarantee of sharing and enjoyment of conserved natural heritage and collective value;
- Ensuring access to qualified information on sustainable practices and responsible use of non-renewable natural resources;
- Citizen's right to responsible action or to the means to exercise that right;

**(f) Social dimension**

- Right to quality in social relations;
- Rights guaranteed in the prevention/fight against critical social problems;
- Guarantee of prevention against exploitation and discrimination of any kind;
- Access to the opportunity for quality education and healthcare;
- Sense of cohesion and strengthening of the group's social bonds;

**g) Symbolic/immaterial dimension**

- Sense of belonging to the social group;
- Sense of well-being and happiness;
- Sense of value of ancestry and cosmologies of the group;
- Feeling of planetary citizenship (community of destiny) and shared sense of existence.

From these dimensions, it is possible to think about social inclusion from a broad analysis, making it possible to understand how the process of social inclusion is developing. Based on these



categories, Irving (2015) demonstrates that the promotion of social inclusion is linked to the formation of a critical sense in society, the promotion of citizenship rights, solidarity, co-responsibility in transformations and the guarantee of participation, enabling individuals to assume a central and decisive role in the development process.

## FINAL THOUGHTS

The debate on social inclusion and social exclusion in modern society shows that, in addition to the complexity intrinsic to the social dynamics and challenges faced by various groups and individuals, these concepts are polysemic and their discussion occurs historically, since social relations permeate the existence of humanity.

Understanding the need to ensure equal access to social, economic, cultural, environmental, political and symbolic resources highlights the importance of promoting social cohesion and justice. However, this understanding also shows that the processes of social exclusion, determined by marginalization, discrimination and abstention from fundamental rights, are still frequent in contemporary societies.

In this sense, it is important to emphasize that the understanding of these concepts must reach the public agencies, responsible for the institution of public policies, since public policies aimed at basic social rights and social well-being are fundamental to reduce the social exclusions that are so present in the world.

Therefore, in view of the discussion presented, it is understood that it is essential that governments, institutions and civil society itself collectively seek to promote public policies and practices that suppress social exclusion and promote the social inclusion of all individuals who make up society. This requires a commitment to social justice, respect for diversity and equity in all aspects of life, seeking to implement measures capable of combating the structural causes of social exclusion and building a fairer and more inclusive world.



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