

# From Social Exclusion to Social Inclusion

## Theory and Practice over Two Continents

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### **ABSTRACT**

*The article concerns research in the normative social science and is aimed at making a contentious argument that the conceptual frameworks which underpinned much of the literature and research on social exclusion are rooted in European and Anglo Saxon traditions. As such they ignore the contributions made by people of Africa, Asia and Latin America. The discourse regarding social exclusion and social inclusion could therefore not be only with a Western perspective, but should note that the reality of global exclusion is felt most in the developing world. A second challenge is the marked absence of any discussion on power imbedded in social relations and the disruption of bonds between individuals and society. The third challenge to the discourse is the tepid acknowledgement of racism, sexism and other forms of socially constructed exclusions. The fourth challenge relates to the role of the state. It is argued that the discourse should be adapted to country specific situations and contexts to have policy relevance. The European/Western model should be rearticulated with a more developmental focus that puts global inequalities up front and centre and draws from the global South. The future of the social inclusion debate will depend on the ability to develop a global social inclusion drawing on the intellectual capacities of both the global North and the global South.*

### **INTRODUCTION**

In privileging the discourse of social inclusion as the entry point into social analysis is placed at the centre of the research, analytical and even the political concerns a “proactive human

development approach to social well being that calls for more than the removal of barriers and risks". In this sense the article will be dealing both with a normative concept and an evaluative tool.

Theoretical frameworks and the research based on them are very much about normative social science. Social inclusion is about a kind of social science that is rationally motivated to engage in social transformation. It is not about change for the sake of change. It is about research that would make for a better society, a better state of affairs than exclusion. Hence, social inclusion has tremendous political potential building universal bridges of solidarity that transcend the potential fragmenting and siloing effects of identity politics. In this sense a very compelling case for a social inclusion analytical framework, can be made unapologetically because it is a preferred entry point to social enquiry. It may not be the only useful point of entry, but it is the most illuminating and the most compelling analytically, conceptually as well as politically.

This article seeks to make a modest, but contentious argument: the conceptual frames that have underpinned much of the literature and research on social exclusion – most notably through the lenses of Ruth Levitas (1996:1998), and Hilary Silver (1995), progressive as they are, are rooted in European and Anglo Saxon traditions that ignore the contributions made by peoples of Africa, Asia and Latin America. These profoundly important discourses set the tone for much of the debates and the research for the next decade and a half.

This in turn has contributed to the suspicion that once again a Western concept was adopted whose utility and applicability to the developing world are dubious. Thus the broad question: do the concepts of social inclusion and exclusion have meaning beyond the developed world? And even in the developed world its utility is contextual and has the discourse or the multiplicity of discourses far outrun the initial debate stimulated by Silver and Levitas among others. Recall that solidarity is universal and is a fight for equality, social justice and freedom.

The inability of Western thinkers to link the inclusion discourse to the universality of solidarity is highly problematic and demonstrates the acute need for increased interactions among organic intellectuals globally. The discourse cannot be a Western discourse exclusively, particularly when the reality of global exclusion is felt most in the developing world.

The second major challenge with the initial framing of the discourse is that there was a marked absence of any discussion of power and little discussion of power embedded in social relations and the disruption of the bonds between individuals and society. At the heart of the social rupture is power and powerlessness. The excluded are also those who by virtue of their social location and unequal access to valued goods and services have no access to power. This is not about human agency – i.e. the victimisation and re-victimisation of the marginalised and the excluded its about the concentration of power in the hands of elites where the power is continually circulated among a small group who share a fraternity of interest in maintaining the *status quo*.

The third major challenge to the discourse is its tepid acknowledgement of, racism, sexism and of other forms of socially constructed exclusions. The fourth challenge is the virtual absence of any discussion of the role of the state in a market-based economy. The specifically South African contribution to the inclusion discourse is to position it in the context of the role of the state. This is interesting for two reasons – the apartheid state was a racially based exclusionary state while the post apartheid state is democratic and developmental. So as the



post apartheid state seeks to implement social policy it does so as an African variant of the developmental state.

## SOCIAL EXCLUSION

John Veit-Wilson distinguishes between weak versions of the social exclusion discourse which focus on changing the excluded and integrating them into society, and stronger versions of the discourse which focus on power relations between the excluded and those doing the excluding (Veit-Wilson 1998:45). Academics and policy makers have utilised the term social exclusion, to cover a very wide terrain of *socially excluded* affected by a wide range of social and economic problems (Sen 2000:1). In the 1980s a more structural approach was approached that linked exclusion to changes in the economy but, which caused ruptures between individuals and society. The most significant contribution of the European discourse is the focus on non-monetary forms of exclusion. In the United Kingdom the initial focus was of course on poverty – widely rejected by the French. But here too there was a narrow focus on income poverty. In 1995, Hilary Silver presented a classification of social exclusion typified by three paradigms, each reflecting different national notions of social integration – republicanism, liberalism, and social democracy.

Walker and Walker comment on the wide scope of social exclusion and define it as “a comprehensive formulation, which refers to the dynamic process of being shut out, fully or partially, from any of the social, economic, political or cultural systems which determine the social integration of a person in a society. Social exclusion may therefore be seen as the denial (non-realisation) of the civil, political and social rights of citizenship” (Walker and Walker 1997:8) The link between social exclusion and citizenship hinges on the degree to which individuals from racialised and marginalised communities encounter structural and systemic barriers and are denied or restricted from participating in society. Duffy similarly notes that social exclusion refers to “the inability to participate effectively in economic, social, political and cultural life, and, in some characterisations, alienation and distance from the mainstream society” (Duffy, cited by Barry 1998:2).

For Wilson (1995) and Byrne (1999), social exclusion is about process and outcome; agency and structure; it is about the role of political, economic and social institutions and decisions that reinforce poverty and exclusion. Conversely then an approach that draws on the centrality of power (the power to exclude and the power to challenge) the multiple forms of exclusion opens the space for the agency of the excluded as political and social actors and not as passive victims.

These initial conceptions of social exclusion are firmly grounded in a European albeit progressive European worldview of both social exclusion and inclusion. Their lens is limited to European and Anglo Saxon experiences and completely excludes any reference to the global South i.e. Africa, Asia, and Latin America. Within the literature spawned in the Levitas/Silver tradition, social exclusion is seen as rooted in the French Republican norms of solidarity, in contrast to the assumed individualistic Anglo-Saxon *norms* and idea of *poverty* (Silver 1994; De Haan 1999).

The universality of solidarity particularly in combating the multiple forms of exclusion on a global as well as on national scales (the fights against slavery, colonialism, settler colonialism,

neo-colonialism, and now neo-liberal globalisation) is a real and tangible expression of the politics of inclusion that transcends French Republicanism. The fight for freedom and equality and social justice are equally universal expressions. The socio-spatial and Euro-centered framing of social inclusion as a political solution to exclusion (or adverse inclusion) is therefore singularly unhelpful. Why are there no reference points for the notions of Ubuntu and Ujama – social solidarity in Southern and Eastern Africa? Why is there no reference points for the forms of solidarity found in the teachings of the Aboriginal peoples of the world? Why is there no reference points for the forms of pre-colonial expressions of solidarity, communalism and popular democracy found in India?

Certainly there is a great deal of consensus around the utility of social exclusion, as a heuristic device that draws attention to the multi-dimensional and relational aspects of poverty and deprivation. For Room (1995) the distinction between poverty and social exclusion marks a departure from a static account of disadvantage that focused on individuals or households to a dynamic analysis of processes where the importance of the local context is recognised. Similarly, Sen (2000:6-7) draws attention to the relational dimension of poverty and deprivation and how it functions as a social exclusion device.

The debate in Canada moved far beyond the Levitas/Silver frame. In Canada, given its settler colonial history and its history of migration both of which are essential to the nation-building project, a discussion of social inclusion has to be informed by an analysis of the exclusionary nature of the nation-building project. Thus issues of multiculturalism, racism, aboriginality, sexism, settler colonialism, the exclusionary character of immigration and refugee policies among other issues all needed to be addressed.

To recognise the salience of social exclusion as an explanatory tool is to develop public policies that place individuals and groups who are excluded on the basis of race or aboriginal status (or other socially constructed criteria) at the centre both in the discussions about their social conditions of existence and in the debate about the eradication of exclusion. The various manifestations of social exclusion need to be tabled before there can be a meaningful and constructive discussion of social inclusion.

Exclusion is very much a lived experience and can be quantified. For Rogers (1995: 45) and Aasland and Fløtten, (2000:1028), this dynamic process of being shut out can be diagnosed and measured as patterns of exclusion which affect individuals and groups. It results in economic, social, political and cultural disadvantage. Those who are disadvantaged marginalised and *Others* in society do not have access to valued goods and services and are consequently excluded. There is therefore a mutually reinforcing relationship between exclusion and disadvantage and it is necessary to both unpack that relationship and to address each of its multiple manifestations in order to break what could be called the “vicious cycle of exclusion and disadvantage”. The contemporary discourse on social exclusion is too narrowly focused on poverty and integration into the paid labour market, and it potentially obscures a bigger debate in a country like South Africa about how racism as oppression and marginalisation increased the social distance between and among groups of people in society. The answer to this lies with political struggle. Estville succinctly argues “Social exclusion is an accumulation of confluent processes with successive ruptures arising from the heart of economy, politics and society; gradually distances and places persons, groups, communities and territories in positions of inferiority in relation to centre powers, resources and prevailing values” (Estville 2003).



The multiple and intersecting forms of exclusion are reinforced by the various forms of social constructions and stratification – e.g. class, gender, ethnicity/race, ability/disability, migration status, – and are both *constitutive* and *instrumental*. In constitutive terms, the right and freedom to participate in all walks of public life is central to place, claiming and to belonging, and the socially just society has a responsibility to ensure that equality of opportunity is not denied, that people are provided with the necessary goods and services to live in society.

Social exclusion involves a multiplicity of causes and effects and this makes it incredibly attractive as an explanatory tool. This malleability is also the source of contestation. For Sen, because the concept is so “versatile and adaptable... there may be a temptation to dress up every deprivation as a case of social exclusion” (Sen 2000:9). The rapidity with which both academics and policy makers grabbed the concept has led Else Oyen to remark that researchers were picking “up the concept and are now running all over the place arranging seminars and conferences to find a researchable content in an umbrella concept for which there is limited theoretical underpinning.” (1997:63).

## **MAKING INCLUSION MATTER: THE CANADIAN CONTRIBUTION**

Following the argument that there are strong and weak versions of social exclusion, it is important to distinguish between weak and strong versions of the social inclusion discourse. The former focuses simply on integration of the excluded (via a state commitment to multiculturalism), while the latter takes a structural approach that focuses on historical processes that continually reproduce oppression, discrimination and exclusion. Strong approaches to the social inclusion discourse, therefore, are intimately concerned with rights, citizenship and restructured relations between racialised minority communities and the institutions of the dominant society. The focus is on valued recognition and valued participation by those excluded from full participation in society and the benefits of society.

For social inclusion to matter, it has to take its rightful place not along a continuum (from exclusion to inclusion), but as emerging out of a thorough analysis of exclusion. It has to simultaneously transcend the limits of essentialism, critique hierarchies of oppression and promote a transformative agenda that links together the various, often disparate struggles against oppression, inequality and injustice. The glue that would bind these social movements together is a kind of inclusion that would lead to the creation of a more just and equitable society. In this conceptualisation, social inclusion can provide a coherent critique of the multiple forms of social injustices and the concomitant institutional policies and practices.

The specifically Canadian contribution to the discourse has been to focus on inclusion not just exclusion. The debate in Canada broadens the discourse from poverty and labour market inclusion to intersectionality, to issues affecting the First Peoples, to the challenges of migration. Researchers identified social inclusion as not simply a response to exclusion but as a proactive, human development approach to social wellbeing that calls for more than the removal of barriers or risks. Social inclusion recognises the importance of difference and diversity, which have become central to a new understanding identity at both a national and community levels.

Whatever the source of exclusion (poverty, racism, fear of differences or lack of political clout), the consequences, are the same (though the degree may be different): a lack of recognition and acceptance; powerlessness and *voicelessness*; economic vulnerability; and, diminished life experiences and limited life prospects. The social exclusion of individuals and groups can become a major threat to social cohesion and economic prosperity of society. A rights-based approach is not sufficient to address the personal and systemic exclusions experienced by children and adults. People with disabilities are leading the way in calling for approaches based on social inclusion and valued recognition to deliver what human rights claims alone cannot.

Diversity and difference, whether on the basis of race, disability, religion, culture or gender, must be recognised and valued. Public policy must be consciously linked to the lived experiences of children and families, both in terms of the actual programmes and in terms of the process for arriving at those policies and programmes. Universal social programs and policies that serve all children and families generally provide a stronger foundation for improving wellbeing than residual, targeted or segregated approaches.

Social inclusion has to provide a coherent critique of the multiple forms of social injustices and the concomitant institutional policies and practices. For social inclusion to matter, for it to resonate, it must provide space for a discussion of oppression and discrimination. Social inclusion has to take its rightful place not along a continuum (from exclusion to inclusion), but as emerging out of a thorough analysis of exclusion. It has to simultaneously transcend the limits of essentialism, critique hierarchies of oppression and articulate the universality of solidarity by promoting a transformative agenda that links together the various, often disparate struggles against oppression, inequality and injustice.

Social inclusion begins from the premise that it is democratic citizenship that is at risk when a society fails to develop the talents and capacities of all its members. The move to social inclusion is eroded when the rights of minorities are not respected and accommodated and minorities feel *othered*. Social inclusion forces the discourse beyond the realm of formal equality and into the realm of substantive equality, which is characterised by challenges to discrimination, exclusion and inequality. Social Inclusion has to be about valued recognition, valued participation and about valued citizenship.

Diverse societies like the South African and in the Canadian become the sites where ethno-racial communities contest ideas of identity, citizenship and cohesion and inclusion. They struggle to have their identities recognised alongside the dominant culture. Charles Taylor argues that the refusal to recognise minority rights can be seen as a form of repression:

*our identity is partly shaped by recognition or its absence, often by the misrecognition of others, and so a person or group of people can suffer real damage, real distortion, if the people or society around them mirror back to them a confining or demeaning or contemptible picture of themselves. Non-recognition or misrecognition can inflict harm, can be a form of oppression.*

He points to the importance of the “links between recognition and identity” (Taylor 1992:50). Iris Young offers a different view placing more emphasis on the interrelationship between injustice and politics “we should show how recognition is a means to, or an element in, economic and political equality and that so long as the cultural denigration of groups



produces or reinforces structural economic oppressions, the two struggles are continuous” (Young 1997:156 & 159).

Social inclusion can and will democratise democracy. The political value of social inclusion is that it posits the radical alternative to exclusion and is a viable political response to exclusion. The value of social inclusion is that it is fully capable of meeting the greatest challenges posed by diversity – to build on the traditions of equality espoused in liberalism and to move to the incorporation of the ideals of anti – discrimination as core ideals exemplifying national values.

An inclusive democratic citizenship represents an expansive discourse of *citizenship*, embracing civil, political, cultural and social rights. Citizenship is, in part, about equality of status and respect and active engagement by enabling voice and agency and in so doing meeting the basic requirements of equality. Thomas Janoski, argues for a right of participation, which pushes citizenship rights into the centre of more recent welfare state controversies and democratic struggles (1998:50). This, for Carol Gould (1988), is a fundamental human right not simply a citizenship right. She argues for an extension of the human right of democratic participation to include the right of participation in social and economic decision-making. For Gould this is linked to human agency and the principle of freedom as self development.

Social inclusion allows for the convergence of citizenship and human rights discourses such that a strong case is made for the excluded, the vulnerable and the marginalised to be involved in decisions about their lives. Social inclusion does not stand apart from the equity and social justice claims advanced by marginalised groups in Canada and South Africa.

## Two Significant Challenges

Two of the most salient caveats with respect to the inclusion discourse relate to partial and incomplete inclusion and the way states have appropriated the discourse and essentially depoliticised it.

The first challenge is about incomplete and unfavourable inclusion. Not all inclusion is equitable. Members of racialised minority communities may well be included in the labour market but they can still face discrimination at the workplace and they can face barriers to upward mobility within the organisation. Attempting a more nuanced understanding of the concept (that is beyond the inclusion-exclusion binary) Sen argues that:

*While exclusion is one route to capability failure and poverty, what may be called **unfavourable inclusion** can also be a considerable danger. Indeed, many problems of deprivation arise from unfavourable terms of inclusion and adverse participation, rather than what can be sensibly seen primarily as a case of exclusion as such (2000:28).*

He argues further that: “It is... very important to distinguish between the nature of a problem where some people are being *kept out* (or at least *left out*) and the characteristics of a different problem where some people are being included—may even be forced to be included—in deeply unfavourable terms” (2000:29).

Kantor (2009) suggests that *unfavourable inclusion* can be differentiated further into *adverse inclusion* and *constrained inclusion*. The former refers to the quality of inclusion and

the latter identifies the options available to a person in the context of unfavourable inclusion. Social exclusion, inclusion, or unfavourable inclusion are in this sense linked directly to the labour market, to employment and livelihood.

The second challenge relates to the malleability of the concept of social inclusion – the state appropriates the discourse while not silencing it. The discourse then finds multiple expressions each of which puts greater distance between a critical approach and a state centred approach.

Berghman (1995), Levitas (1998), Marsh & Mullins (1998) and Anderson (2002) all argue that the fuzziness of the concept encouraged politicians within the European Community to adopt it as a mainstream policy issue in the late 1980s. It enabled state actors to use the concept strategically not substantively. Both Silver (1994) and Levitas (1998) point out that the state readily co-opted the language to communicate a commitment to addressing poverty. State actors also use the concepts to identify and legitimise new approaches to public service delivery. The multidimensionality of the concept enables the state to articulate complex policy issues which fit neatly with contemporary discourses in policy making such as *partnership* and *joined up* government. Whether this leads to novel policy responses in practice is contentious.

The value of the inclusion/exclusion discourse is that it can offer an interesting way of reconceptualising and understanding social disadvantage as the globalisation of economic relations which have a legacy in the colonial period. Thus a post colonial reading of the discourse requires that, for the concepts to have global resonance and relevance, the concepts need to shed their European and Anglo foci. The literature on poverty, deprivation and marginalisation in Africa, Asia, Latin America and the Middle East, have displayed a healthy skepticism about the applicability of the concepts of inclusion and exclusion to the global South. The contexts are different – in the South the vast majority is poor while in the developed North the vast majority is not poor. Nonetheless there are hints that the discourse, shed some of its European centred approach and adapted, has relevance. The first argument advanced is that the social problems of Europe reflect what has been going on in the global South for centuries (Yepez 1994; Touraine 1992).

The language in the global South has already invoked notions of marginalisation, exclusion, of global exclusion and of a global division of labour that only partially includes and then on a hugely unequal basis. In this sense the exclusion discourse is catching up with the discourses of the global South. This could well be seen as discourse imperialism – suggesting, implying, and projecting the European discourse of *social exclusion* on to the global South that has a long history of dealing with multiple, intersecting exclusions

*Secondly*, the global South has a long history and understanding of and engagement with exclusion and marginality and poverty. They see it not as lack of labour market integration, but as structurally linked to the history of colonialism and the way the economies of the global South have been peripherally integrated into the global economy. This notion of the uneven and unequal integration into the global economy as the source of exclusions on a national and regional scale runs counter to the European view of social exclusion. Structural adjustment policies of the 1980s and 1990s as well as successive global crises have only deepened the exclusion of the majority in the global South.

Social inclusion unlike poverty studies, points to the ways in which people's lives are affected by interrelationship between structural changes in the economy and in social





institutions – in real and tangible ways. Extending this argument then means looking at ways in which economies on the global peripheries are affected by global crises, by the restructuring of the global economy and the impacts these have on the lives of the global majority.

Recent studies, for example, by the Economic Commission for Africa show that, if current trends continue, Sub-Saharan Africa is unlikely to meet the target of halving the proportion of people whose income is less than \$1 a day between 1990 and 2015. The 2006 *Millennium Development Goals* (MDGs) report also arrived at the same conclusion. The data presented in the report shows that between 1990 and 2002 the number of people living in extreme poverty in Sub-Saharan Africa increased by 140 million. The report also shows that Sub-Saharan Africa lags behind in other areas of the MDGs. Given that the target date for meeting the MDGs is 2015 and there are now four years left, there is the need for urgent co-ordinated actions directed at social inclusion.

The Commission on Africa noted

*Growth and globalisation have brought higher standards to billions of men and women. Yet it is not a wealth, which everyone enjoys. In Africa millions of people live each day in abject poverty and squalor ... In years to come future generations will look back, and wonder how could our world have known and failed to act?*

In this context a global approach to inclusion is absolutely necessary. It can address problems associated with globalisation for, as Wolfe suggests, “within the global system more people are becoming permanently superfluous, irrelevant, or hindrances to its functioning” (Wolfe 1995); problems associated with increasing, and increasingly blocked, international migration; intensifying competitive pressures which are bringing in their train, various actions by social collectivities to curb competition (Crompton & Brown 1994); and changes to the global division of labour in the age of rapid technological advancement which polarises the global workforce.

Globalising the inclusion discourse, making it relevant, requires four significant discourse interventions. *Firstly*, the centre/periphery literature suggests that there is a need to incorporate into the inclusion/exclusion discourse issues of structural adjustment, global trade, migration flows of people and capital, global poverty, aid and technology transfers, and the role of global institutions of governance.

*Secondly*, the Western discourse focuses on the relationship between labour markets and social exclusion. In the context of the global South this needs to be broadened out to include a discussion of global not only domestic labour markets, to access to land, to the informal economy, to subsistence production and to ways in which micro credit can improve the lives of people.

*Thirdly*, focusing on rights and on human agency is very important and a global inclusion discourse needs to examine modes of popular participation in countries and communities of the global South. This is important, for as Yepez points out, most of the poor in the global South have never been integrated through a welfare state system (Yepez 1994).

*Fourthly*, it is important to start with social institutions in which rules governing exclusionary and inclusionary practices are negotiated, but are also going beyond them. The African literature, for example, raises questions about the *nationality* of social exclusion –

specifically the role of the nation state in the institutionalisation of exclusionary practices (Gore 1995). How do we understand the way in which globalisation has led to unequal wealth distribution at the national level? How do we understand the way in which forms of exclusion in countries of the global South have been perpetuated by despotic regimes propped up by countries of the global North?

In the global South, global and domestic market institutions, citizenship rights and the associations of civil society all interact in complex ways in processes of social exclusion. For example, in Africa, Asia and Latin America, being poor means not having property and property rights which can be used to leverage credit. This in turn increases their costs and drives them further into poverty and diminishes their ability to secure vital skills to access the changing labour market demands. Linked to labour market exclusions are exclusions from social and citizenship rights. The latter is particularly important in countries and regions plagued by conflict and where there are large groups of people who are both internally and externally displaced.

Incorporating a global inclusion dimension into Western discourses of social inclusion can strengthen and revitalise social inclusion as theory and practice. It is important to refer to insights from literature that the global South could contribute to the emergence of a concept of social exclusion and inclusion that is not Eurocentric, and one whose relevance can be exponentially expanded.

## **SOCIAL INCLUSION IN SOUTH AFRICA**

The history of Apartheid South Africa is the history of systemic, structural, legalised, institutionalised and intensely personalised racial discrimination. An entire socio-economic and political edifice was constructed solely on the basis of race.

The resultant racial bifurcation and polarisation of South African society was continually reproduced and reinforced by both the ideological as well as the repressive arms of the state. The legacy of apartheid was racialised poverty, unemployment, underemployment, unequal wealth distribution; spatial segregation; unequal distribution of the valued goods and services including with respect to education, housing; health care; pensions; sanitation services; and labour market integration. Racism is about incomplete citizenship, undervalued rights, undervalued recognition and undervalued participation. Racial inequality and discrimination are historically derived, have persisted over the centuries and have been constantly reproduced in old as well as new ways.

In the South African context a number of important issues arose as soon as the discourse was introduced. One critical question however is whether processes of social cohesion and social inclusion are to occur simultaneously and in tandem or whether there can be inclusion without there being cohesion. Certainly a society can be cohesive without being inclusive, but can a society like the South African one be inclusive without being cohesive? Is there a need for a socially cohesive South Africa as the first step in the creation of an inclusive South Africa – the debate then focused on:

- reconciliation as cohesion;
- reconciliation before inclusion; and
- reconciliation in the face of socio-economic immense disparities?



Social inclusion in South Africa is a process of socio-economic and political transformation that has as an essential precondition, i.e. the creation of a more socially cohesive South Africa. The reality, however, is that creating a non-racial, non-sexist, democratic and inclusive South Africa cannot await the creation of *full* cohesion. From both public policy pronouncements and social discourse analysis, reconstruction and development as well as nation-building and reconciliation featured as the core issues defining South African society's approach to inclusion. But are these sufficient to capture the public imagination?

In attempting to address these issues the Mbeki government set the following policy goals:

- reduce poverty by half (by 2014);
- reduce unemployment by half (by 2014);
- increase wealth distribution between the *two-economies*;
- generate sustainable economic growth (4,5-6%); and
- create a non-racial non-sexist democratic and inclusive South Africa.

For the South African government the reality was clear: In terms of ownership and control of wealth and income; access to social services such as health, water, housing, electricity and education; the character of civil society structures to which individuals belong; and public opinion on various aspects of government activity, this profile was still too obvious – a racial bifurcation still persisted.

One key question centred on how to mediate the tension between a market-based economic system premised on competition, and the desire to build a caring society and what President Mbeki called *A better Life for All*. This is not merely a matter of social values; it is about the impact of public policy. It finds expression as a tension *firstly* between encouraging individual self-advancement and collective development, and *secondly* between encouraging individual excellence and social inclusion.

The dynamic of popular legitimacy, macro-economic stability, improving social conditions and a security system changing for the better, defines the trajectory of social relations in the first decade and a half of freedom in South Africa. The greatest progress was manifest in those areas in which the state has direct control, raising a critical question about the leadership role of the state in mobilising society to take active part in the processes of change.

The national debate that unfolded during President Mbeki's terms in government was about the form of the state in post apartheid South Africa. Would it be a minimalist or developmental state? This was very pressing as democracy in South Africa coincided with the 1990's global economic crisis when the anorexic state was fashionable in the West and when the World Bank and the IMF were promoting less state involvement and greater structural adjustment policies. What would the role of the state in a market based economy be? Debates ensued about the form of forms of social expenditure – social grants to alleviate poverty in tandem with massive state expenditure to eradicate poverty, underdevelopment and unemployment. The serious questions that were confronted included:

- What does the findings of the various Macro-Social Reports to Cabinet say about the current social policies in their totality?
- Are government's social policies effective with regard to the material conditions of South Africans?

- Given the policy context and the rapidly changing social environment are government's policies still relevant and/or responsive enough to the changing environment?
- Is this a question of expanding services, or of whether government is making an impact and at which rate?

From the onset of democracy, government was committed to poverty alleviation in the short run and eradication in the long run. The state looked at ways of extending social grants to children and families, giving Black people with disabilities an income grant for the first time, giving Black seniors a decent pension that they could live on (for the first time). The state entertained a debate about a Basic Income Grant for All but that was not adopted. What were adopted were short term policies to integrate youth into the labour market, to integrate women into the labour market and to engage in a long term job creation strategy.

Under President Mbeki the developmental state in South Africa is defined by its objectives and institutional and administrative configuration to promote pro-poor economic growth and sustainable development and ensures that the well being of all the people and in particular the well being of vulnerable and marginalised groups is improved. The democratic developmental state in the contemporary period, characterised by globalisation, has to promote wealth creation and distribution and social protection.

Social Inclusion was secreted into the very transformative character of the South African developmental state which derived from a commitment to social justice and to ensuring *inter alia* that democracy (including its institutions, the clear separation of powers, the multi-party character of the political system and the role of civil society organisations) is respected and advanced. The Constitution and the rule of law have to be safeguarded and the market in key and critical sectors has to be regulated. Poverty and unemployment have to be halved by 2014 to meet Millennium Development Objectives. At the same time, South Africa's integration into the global economy has to be on the basis of advancing national development objectives (no Structural Adjustment Policies, no unregulated, non-phased in opening of domestic markets to foreign investors). Market generated inequalities need to be addressed through fiscal redistribution using primarily the levers of taxation and social policy (pro-poor income strategies; minimum wage strategies, pensions, subsidies to higher education and skills training and development). Importance has to be placed on social infrastructure as well as maintaining physical infrastructure (so investing in people is as essential as investing in roads and stadiums and electricity). Economic development models being advanced do not focus on fast economic growth as an end in itself, but the goal should also be that of poverty eradication, human and social development and environmental sustainability. Equality, equality of opportunity to all citizens and national social cohesion are continually promoted.

The particular form democracy takes in South Africa is characterised by citizen engagement (participatory democracy) and an active state (the developmental state) which encourages participation while simultaneously using state resources to promote social justice, the development of social and physical infrastructure and greater sharing of the fruits of economic growth in an environment of macro-economic and political stability. The institutional and administrative configuration of the developmental state in South Africa have to promote pro-poor economic growth and development to ensure that the well being of all the people and in particular the well being of vulnerable and marginalised groups is improved.



From a social inclusion perspective, a strict focus on poverty alleviation is incremental. A more inclusive approach to public policy and the use of public resources should focus on racialised and gendered poverty alleviation and eradication along with increasing levels of employment and investing in social infrastructure. Since 2002 there has been a significant reduction of poverty, the state has provided water and electricity to millions of people and tens of thousands of new jobs were created (for specific details on the post apartheid developments in the provision of anti-poverty social policy see: APRM Report 2007).

A study by Borat, Naidoo and Van der Westhuizen (2006), analysed welfare shifts in the post-apartheid period, and they found that access to formal housing increased, access to piped water increased, access to electricity for lighting for the poorest households grew by 578%. They concluded that the poorest of the poor have benefited the most from the delivery of basic social and bulk infrastructure services. The most succinct measure of South Africa's performance is that the level of asset and service poverty as well as asset and service inequality has declined dramatically since 1994 (Yu 2010:26).

Another study undertaken by Van der Berg, Burger, Burger, Louw and Yu (2007) finds that poverty has stabilised since 1994 and decreased sharply since 2000. The study also shows that *per capita* real incomes of individuals comprising the poorest two population quintiles rose by more than 30% during 2000-2004. Van der Berg *et al.* (2007) conclude that for all poverty lines ranging from R2 000 to R4 000 *per capita* income per annum, poverty seems to have been declining sharply since about 2002 after a modest rise at the end of the previous decade. Yu (2010:24) offers a similar conclusion based on research involving multiple data sets,

*looking at the poverty trends using the two censuses and CS 2007, if no imputations were involved (i.e., nothing was done on households with zero or unspecified household income) it can be seen that poverty increased between 1996 and 2001, before a rapid decline took place between 2001 and 2007. In addition, the 2007 poverty headcount ratio was lower than the 1996 ratio. Furthermore, poverty headcount ratios decreased in all three surveys after SRMI1, and such decrease was greater when SRMI2 was applied.*

Post Apartheid South Africa has been able to take the core tenets of the European model and develop an inclusion discourse, adapted to the South African context. The state has been able to develop and implement public policies to promote social inclusion. There is recognition of the multidimensionality of exclusion, and of the importance of combating poverty and especially racialised and gendered poverty. The developmental state sought to give the excluded a voice in the decisions affecting their lives and the power of the state was being harnessed in the realisation of the inclusion discourse. But above all President Mbeki knew that all this required a strong state committed to equality and social justice. Post Apartheid South Africa's successes were greatest where the democratic state had most influence.

## CONCLUSIONS

The social inclusion discourse is still relevant but it needs to be adapted to country specific situations and contexts so as to have policy relevance. The debates in Canada and South

Africa both suggest that a clearly articulated, contextually grounded inclusion discourse can be relevant. The European Western model has to be rearticulated with a more developmental focus that puts global inequalities front and centre and that draws on the historical experiences of both inclusion and exclusion from the global South. In short, the future of social inclusion as discourse and practice will depend on the state ability to develop a global social inclusion discourse that can draw on the intellectual well springs of both the global North and the global South. Anything short of this and social inclusion will lose its relevance.

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