

## **SOCIAL EXCLUSION AND VULNERABLE POPULATIONS**

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**ABSTRACT:** *In the last half of the century, significant technological, economic, demographic, political, and ideological changes took place; advanced democracies went to a process of deep economic restructurings. While universal social policies still provide for protection against predictable risks of a life cycle, individual carrier models and welfare standardization can no longer be assumed. There are more and more people suffering from insecurity, or lacking protection of any kind. Excluded populations are therefore more affected than any other categories of social actors and their poverty is more obvious; in a certain sense, it is less “natural” than it has ever been.*

**KEY WORDS:** *social exclusion, welfare, poverty, anti-poverty strategy, social inclusion, quality of life.*

**JEL CLASSIFICATION:** *Z10.*

One of the central objectives of social development programs is fighting poverty and social exclusion. In the contemporary communication on social policies the terms social exclusion and inclusion are more and more frequently used, as an extension to the classical theme of poverty.

In its turn, the phrase “means of fighting poverty” tends to be gradually replaced by “promoting social inclusion”.

While the poverty theme referred strictly to the deficit of financial resources, the new theme of promoting social inclusion refers to a larger problem area. On the one hand, to an extremely varied range of social, cultural, moral, economic range, and on the other, to an active orientation towards social development by active intervention, by progressive construction of an inclusive society.

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The concept of **social exclusion** is more recent and more comprehensive than the concept of poverty, since it includes not only the lack of material means, but also the impossibility of being included in various social, economic, political and cultural “networks”. Besides the deficit of income or consumption involved by poverty, social exclusion also involves a lack of normal participation in day-to-day life, and in social activities (Zamfir & Preda, 2004, p.3).

But as the authors Bocancea & Neamtu (1999, pp. 140-141) suggest, social exclusion has a large visibility and is easily noticed due to the increase of the people supporting it – homeless people, more and more accentuated pauperization of the unemployed, of those without resources or with minimal income, lack of access to jobs, etc. Social exclusion mainly refers to a situation of failure regarding the full attainment of citizen rights, both because of social-economical structural causes, and due to individual causes.

The same sources (Zamfir & Preda, 2004, pp.3-4) state that in Romania, as a country found in a transition process, the social exclusion and inclusion problem area shows certain specifics generated by the communist legacy, but also by the transition process itself. While here are similarities with the western countries regarding the manifestation of certain forms of social exclusion, the differences are mainly related to the exclusion sources, to its proportions and the intensity of its manifestation.

In the western countries, the exclusion sources are mainly marginal manifestations of a social system resulted following a development process that proved to be well-structured, coherent and functional, so far.

In the countries in transition, mainly those which encountered extremely difficult issues, such as Romania, the most important sources of social exclusion lie in the very difficult process of changing, as well as in the disaggregating processes going along with it: the explosion of poverty, processes of social disorganization, incongruence of legislative changes and of the systems of institutions, all taking place in a very short period of time, under various inside and outside influences.

The very **concept of poverty** has raised interpretation problems regarding its real significance. The definition of the concept has suffered modifications in time, in relation with what society defined and admitted as being “basic necessities”. From minimal needs regarding food and cloths, step by step, a minimum requirement of dwelling, education and health was considered, of which any individual should benefit, as member of a society.

A classical definition of poverty was developed by Rowntree, who considered that a person is poor when “his earnings are insufficient for obtaining a minimal necessity of keeping up his physical efficiency” (Lucuț & Rădulescu, 2000, p.125). As a result of this definition, appreciation of the population’s means of subsistence at hand has for a long time been an etalon to measure poverty. Subsequently, such components were appreciated as being too restrictive, thus other definitions and other forms of measuring poverty came up.

Thus, Townsend used for the first time in measuring poverty, the inquiry on family expenses, appreciating that the volume of total expenses of a family represents the most adequate measure of their resources, more suitable than the volume of their total resources.

Poverty is thus defined by the lowest level of resources of an individual or his family, because of which they are excluded from the habits and activities of life that are considered as being usual (Lucuț & Rădulescu, 2000, p.125).

Even if there are a great variety of attempts to define the concept of poverty, its unquestionable sense, present in all the definition used, is the following: poverty is a perpetual state of lack of resources required to provide a decent lifestyle, acceptable at the level of a given community (Zamfir & Zamfir, 1995, p.57).

In 2009, in the paper "*Dimensions of social inclusion in Romania*" produced by the National Institute of Statistics, based on Household Budget Survey shows that pensioners hold a significant percentage of the total population (23.3%) and poor pensioners, 16.4% among the poor persons of 16 years old and over.

Nationally, in 2009, of all pensioners, 3.2% had pension below the severe poverty threshold, 8.5% below the absolute poverty threshold, over a third (35.8%) had pension below the minimum basket of monthly consumption, 43.3% had pensions below the minimum subsistence threshold, while more than half (55.8%) had pension below the minimum of decent living. (table no.1).

**Table 1. Pensioners at national level whose pensions situate under the thresholds of monthly (%)**

Thresholds of monthly income	Maximum reference value (lei)	% of the total number of pensioners
Severe poverty	179	3.2
Absolute poverty	259	8.5
Minimum basket of monthly consumption	482	35.8
Minimum subsistence level	559	43.3
Minimum level of decent living	697	55.8

Source: National Council of Senior Citizens (2011), *Socio-economic situation of older people in Romania and EU countries - present and development perspectives*

In the Jiu Valley, in almost 15% of cases financial resources do not cover basic necessities, and for a third of families, the incomes barely can cover the minimum bare necessities. Just over a third of families manage to lead a decent life, and just over 10% can afford some expenses that are not related to the minimum bare necessities, but with big effort. Thus, we can say that almost 15% of the subjects / families live in absolute poverty, a double proportion is in relative poverty, one third can have a minimum decent life, while just less over 10% can enjoy a generally good living standard, the percentage of those who may say that benefits from resource abundance is insignificant (table no.2).

**Table 2. Pensioners living in the Jiu Valley under the threshold of monthly income (%)**

Answering options	Threshold of monthly income	% respondents
We cannot even cover basic necessities	Absolute poverty	14.7
We can cover basic necessities	Relative poverty	34.0
We can have a decent living standard, but we cannot afford other expenses.	Decent minimum living standard	34.7
We can afford other expenses but with big effort	Generally good standard of living	12.3
We can manage to have all we need, with no big effort.	Abundance of resources	4.3

Source: Research conducted by the author

As a member state of EU-27, Romania has applied the methodology to estimate poverty recommended by Eurostat (relative method), while developing a national system based on estimating absolute poverty method. The difficulties encountered in Europe and worldwide related to social protection in general and of the elderly persons, in particular, here we consider Romania situation, were added to extra problems of economic transition, the inadequacies of the legislative and institutional framework.

The segment poor population from amidst the elderly persons has emerged in the process of impoverishment of the majority population. According to social researches, families of pensioners have an intermediate rate of poverty, but lower than average (15.7% to 22.4% in 2009). Usually, the elderly persons (retirees) are not among the beneficiaries of economic growth. Current expenditure, especially for utilities, tends to cause slipping into poverty of more and more elderly persons.

The problem of measuring poverty raised several difficulties, and the methods applied were often criticized. The definitions of poverty involve almost always judgments of value, since, beyond the lack of comfort, prosperity and satisfaction, poverty implicitly includes the concept of incapacity of attaining certain conditions of existence.

As a result of the critics brought to the strategies of poverty assessment, the standards of living of the population tend to be defined, more and more, in terms of final outputs of which the population benefits, with direct reference to social indicators that assess health, education, nutrition etc.

Therefore, the majority of the analysts consider the necessity of directly correlating poverty and standards of living.

The last decades of the 20<sup>th</sup> century brought along, at least for the well developed societies, a new approach of poverty and standard of living. Alongside with the increase of the level of aspirations, of technological progress and material possibilities of societies, with the diversification of lifestyles, with the increasing interest for community problems in detriment of society in general, the attention of public opinion, of political world and of scientific community more and more focussed

on problems of general and individual wellbeing, on the problem of poverty and social inclusion, as objective of social protection systems.

An **antipoverty strategy** is a way of unitary planning a body of programmes, measures and actions systematically directed towards supporting poor persons and families, in view of providing a higher standard of living. The concept overlaps partly the body of social policies, run in the benefit of the poor, to which the component of their integrated planning is added. An antipoverty strategy aims at all sectors, promoting objectives including all plans: jobs, dwellings, health, education protection of family and children, social protection of underprivileged categories etc.

To be able to talk about antipoverty strategy, the public system should be involved at the level of its conception and progress, but non government actors could participate as well. In principle, a functional strategy should benefit from resources and should fix objectives in relation to those, it should be made operational in an action plan that would provide detailed measures and would identify how its progress towards reaching the objectives would be monitored. (Zamfir & Stănescu, 2007, p.553).

Poverty control policies represented one of the most important fields of articulation and development of social protection systems, of social policies in general. The first measures of social policy were developed to support this underprivileged category. Thus, the Poor Law Act in Great Britain in 1601 represents the first antipoverty strategy of a state. This regulation stipulates the obligation of each parish to take over the responsibility for their own poor, offering them assistance in exchange for work in the benefit of the community – as we would say today – from those who are apt to work, the similarity with the assistance for the poor in our day being remarkable. At the beginning of the 20<sup>th</sup> century, all developed countries ran support programmes for the poor.

Eradication of extreme poverty is a fundamental objective of the UNO global strategy of promoting Objectives of millennium development, which has set the objective of reducing by half the Dimensions of this phenomenon until 2015 (Zamfir & Stănescu, 2007, p.554).

At the level of the EU, poverty control takes place within the institutional framework of the strategy adopted by the European Council of Lisbon with its main objectives the promotion of jobs and economic growth. The concept promoted is not poverty, but social inclusion in other ways as well, not only due to economic reasons.

In the opinion of the same author (Zamfir & Stănescu, 2007, p.554), a considerable expertise has been accumulated in Romania, in the research of the phenomenon of poverty. In the first years after 1989, there was no specific program of controlling poverty, in spite of the increase of this phenomenon, and a widening gap between social strata.

In 1998 a first strategy was developed to fight poverty. Romania drew up its first Country Report on the Objectives of development of the Millennium in the year 2004, becoming one of the 191 participating countries in the global agenda of UNO for development. The Framework-Objective of this strategy is cutting back severe poverty, being complete with a series of more specific objectives, such as the increase of the rate of graduation in mandatory education or improvement of maternal health.

At conceptual level, the last years have marked the shift of the emphasis from poverty control, as lack of economic resources, to the fight against social exclusion, understood as a multidimensional phenomenon, of lack of access to various social services. This shift of accent involved a more comprehensive approach of social policies, where social transfers are completed with the reform of social services (education, health) and the construction of a national system of services of social assistance.

Social programmes help the poor, but do not eliminate poverty from society. The phenomenon of poverty is not strange to any society. Therefore, the aim of poverty control is in fact guiding the social efforts towards reducing risks for poverty becoming permanent or chronic and for social marginalization and exclusion.

Thinking in terms of human rights, poverty and social exclusion can be construed as infringement of people's fundamental social rights. Efficiency of national policies of providing access of the population to fundamental rights depends on the accuracy of identification and removal of mechanisms that hinder individuals to enjoy these social rights.

Taking into calculation these considerations, a strategy of fighting against social exclusion and of promoting social inclusion in Romania should inevitably be focused, not only on the institutional construction of an inclusive society, but also on the gradual absorption of massive accumulations of phenomena that lead to social disaggregation, results of a history loaded with multiple crises.

The concept of **social inclusion** is relatively new, being more and more frequently used together with the concept of social exclusion, in the process of formulating social policies, both at European and international level.

On the occasion of the European Council in Lisbon (March 2000), the mutual social goals of the member states were established and the strategic objective of the EU, that of becoming until the year 2010, "the most dynamic and competitive economy based on knowledge, capable of a durable economic growth, with more and better jobs and a higher social cohesion" (European Commission, 2001, apud Zamfir & Stanescu, 2007, p.300).

The measures of eradication of poverty and social exclusion were essential points of the Social Agenda adopted in Lisbon, the concept of social inclusion having been entered in this context (Stoica, 2007, p.300).

Promotion of social inclusion became a priority common to member states, the following directions of action having been established regarding fighting against poverty and social exclusion at community level:

- participation in the job market and everyone's access to resources, goods, rights and services;
- prevention social exclusion risk;
- concrete actions for vulnerable groups;
- mobilization of all involved.

These priority themes were included by the member states in the National Anti-Poverty and Promotion of Social Inclusion Plans, as an answer to social problem area.

In an international context one cannot speak of a consensus on what the term social inclusion means. The motive is both the differences between individuals, and between countries, a principal role being played by the economic and cultural situation specific to each country.

Social inclusion is reflected not only in material life conditions, but also as a subjective element: self-esteem and the feeling of belonging to a community are important elements of these subjective dimensions. Material welfare is thus a key dimension of social inclusion but it is correlated to terms such as social cohesion and social capital, the accent being mainly on the basic human necessities and in a smaller degree on income and wealth (Stoica & Stanescu, 2007, p.301).

The European principles on social inclusion, as well as the experience of the EU member states in social fields were reference points for developing a National Anti-poverty and Promotion of Social Inclusion Plan. This has been developed taking into consideration the social-economic characteristics of Romania as a country in transition, respecting in the same time the priorities and principles established by the European Council in Lisbon. The plan also establishes strategic objectives regarding poverty eradication and promotion of social inclusion, both on a short term, and on a medium and long term, with protection until the year 2012.

In the context of the Romanian society, social inclusion views a process of reinsertion in normal life forms, in a normal social functioning of persons found in a situation of social exclusion/marginalization, by developing capacities and construction of opportunities.

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