INCLUSION MATTERS

The Foundation for Shared Prosperity

OVERVIEW

THE WORLD BANK

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SOCIAL DEVELOPMENT

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Foreword

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In every country, certain groups—whether illegal immigrants, indigenous people, or other minorities—confront barriers that prevent them from fully participating in their nation’s political, economic, and social life. These groups are branded by stereotypes, stigmas, and superstitions. They often live with insecurity. And such disadvantages not only preclude them from capitalizing on opportunities to lead a better life, they also rob them of dignity.

In many countries, excluded people have organized to right a lifetime of wrongs. These newly active citizens include victims of violence who are demanding justice, or members of growing middle classes demanding greater voice in their countries’ political processes. They come armed or simply angry, protesting in Brazil or India, and occupying Wall Street or Tahrir Square. Taken together, their outrage demonstrates a global crisis of inclusion.

At the World Bank Group, we have realized that confronting the need for social inclusion will prove vital if we are to meet our goal of building shared prosperity for all people. While great strides have been made in reducing extreme poverty, in country after country, groups remain excluded from development gains. A rising tide does not necessarily lift all boats.

Acknowledging this, in May 2013, the United Nations (UN) Secretary-General’s High-Level Panel of Eminent Persons on the Post-2015 Development Agenda called for designing development goals that focus on reaching excluded groups. “Leave no one behind,” they urged the Secretary-General, adding, “We should ensure that no person—regardless of ethnicity, gender, geography, disability, race, or status—is denied universal human rights and basic economic opportunities.”

Including the excluded is a complex challenge. At the World Bank Group, we begin where we always do: by surveying, sifting, and analyzing the evidence. The result of that work is this evidence-based study of social inclusion. It is the first of its kind for the Bank Group. We believe it represents one of the most comprehensive reviews of social inclusion available. While more work is needed, our research allows us to say a few things with confidence:

Ostracized groups exist in all countries, rich and poor, democratic and not. They are often hidden from public censuses, made invisible by their fear of reprisal. Still, they can be found. In Vietnam, for example, where poverty reduction has been impressive, indigenous people are less likely to be covered by health programs or receive essential vaccinations. In the United States, African Americans were twice as likely as whites to be unemployed during the recent financial crisis. In Bolivia, ethnic minority Quechua-speaking women are 28 percentage points less likely to complete secondary school than Spanish-speaking Bolivian men.

Excluded groups are denied opportunities. Excluded groups are significantly less likely to receive the benefits of development investments. In Uganda, for example, where electricity coverage is low,

almost half of respondents from the Buganda group reported having electricity, compared to less than 5 percent of the minority Lugbara and Ngakaramajong populations. The same breakdown appears in terms of access to clean water. Some excluded groups have been denied opportunities for hundreds of years, such as Native Americans in the United States.

Poverty and exclusion are not the same. In some societies, even the rich can be excluded, as might be the case with wealthy homosexual men in some African countries. The protest movements in the Middle East have been fueled in part by demands among middle-class citizens for greater inclusion in public decision making and accountability from political leaders.

Exclusion is costly. Measuring the cost of exclusion has methodological challenges, but the costs—whether social, political, or economic—are likely to be substantial. Occupational segregation can restrict the free movement of talent and resources, resulting in productivity losses to an entire economy. One study found that exclusion of the ethnic minority Roma cost Romania 887 million euros in lost productivity. Studies in Bolivia estimate that ethnic exclusion reduces agricultural productivity by up to 36 percent.

Most importantly, we find abundant evidence that inclusion can be planned and achieved. Education represents an unparalleled agent for stimulating inclusion. Religious leaders and other champions of change can help excluded groups acquire voice and confidence. The march towards greater inclusion, however, is not linear. Expanding the rights of formerly oppressed people risks triggering a backlash from historically dominant groups, who see their interests threatened. The process of fostering inclusion is incremental. It requires time and unwavering commitment. Still, the benefits of persistently striving for inclusion are at once striking and numerous. Examples can be seen around the world, from the overthrow of apartheid in South Africa, to China's outlawing of foot binding, to the growing support that Brazilian police now provide to victims of rape. Exclusion is far from immutable.

Solving the problem of social exclusion is urgent. Tensions are rising around the world, due to demographic shifts, migration, food price shocks, and economic volatility. People fleeing war and extreme poverty often become the most excluded groups in host countries. In the future, moreover, climate change will likely result in mass migrations, as cities and countries confront extreme drought, storms, heat waves, and sea-level rise. Longstanding prejudices may result in excluded groups receiving blame for growing societal tension and competition for resources.

To move ahead wisely, we need a clear research agenda. We need better tools to measure the costs of exclusion and for diagnosing its root causes. We must also develop more sophisticated analyses of which strategies are most likely to foster social inclusion, and mechanisms for gauging when inclusion efforts are working and when they are not.

We offer this report with the hope that it will stimulate research, action, and a broader debate on social inclusion. Increased understanding of this crucial topic will strengthen efforts to deliver better results for the world's poor, and help achieve our shared goals of ending extreme poverty and building shared prosperity for all people.

Jim Yong Kim
President
The World Bank Group

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Social Inclusion

- The process of improving the terms for individuals and groups to take part in society.
- The process of improving the ability, opportunity and dignity of people disadvantaged on the basis of their identity to take part in society.

Introduction

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The World Bank Group's focus on social inclusion began with the observation that even within countries, development investments produced unequal benefits. Further assessments revealed that groups with certain distinguishing characteristics consistently failed to benefit from a nation's progress. These groups were among the poorest in a nation, but they were not consistently the poorest. They were often, but not always, minorities. What set them apart was that they were members of excluded groups—indigenous people, new immigrants, people with disabilities, people with different skin tones, people who spoke the official language imperfectly. These were people branded by stigmas, stereotypes, and superstitions. They confronted unique barriers that kept them from fully participating in their country's political and economic life. They were excluded.

One of the world's greatest development efforts is coming to a close. The year 2015 marks the endpoint for achievement of the Millennium Development Goals (MDGs). In assessing the MDG response and charting a course for the next era of development, the United Nations Secretary-General's High-Level Panel of Eminent Persons on the Post-2015 Development Agenda (UN 2013) called for designing development goals that focus on reaching excluded groups. "Leave no one behind," it advised. "We should ensure that no person—regardless of ethnicity, gender, geography, disability, race, or status—is denied universal human rights and basic economic opportunities."

Along with global developments, the World Bank Group has announced two ambitious goals for itself: ending extreme poverty and promoting shared prosperity. Underlying the goals is the notion of "sustainability." A sustainable path for development and poverty reduction is defined as one that manages the resources of the planet for future generations, ensures social inclusion and adopts fiscally responsible policies that limit future debt burden (World Bank 2013b). As a recent World Bank Group publication notes:

A sustainable path toward ending extreme poverty and promoting shared prosperity would also involve creating an *inclusive society*, not only in terms of economic welfare but also in terms of the voice and empowerment of all groups.

An inclusive society must have the institutions, structures, and processes that empower local communities, so they can hold their governments accountable. It also requires the participation of all groups in society, including traditionally marginalized groups, such as ethnic minorities and indigenous populations, in decision-making processes. (World Bank 2013b, 33, emphasis added)

Social inclusion matters for itself. But it also matters because it is the foundation for shared prosperity and because social exclusion is simply too costly. There are substantial costs—social, political, and economic—to not addressing the exclusion of entire groups of people. The Arab Spring may have been the most costly recent reaction to the exclusion of educated youth—from labor markets but also, and perhaps mainly, from political decision making and accountability. Although there are significant methodological challenges in measuring the cost of exclusion, some efforts have been made. A World Bank report on the Roma (an ethnic minority in Europe) estimates annual productivity losses caused by their exclusion. It suggests that these costs could range from €231 million in Serbia to €887 million in Romania (de Laat 2010).

Exclusion has deleterious consequences for human capital development as well. For instance, a recent report finds that children with disabilities are less likely to start school than children without disabilities and have lower rates of staying in school (WHO and World Bank 2011). Similarly, women in India who experience spousal violence are less likely to receive antenatal care and more likely to have a terminated pregnancy or still birth, and their children are more likely to be stunted than are children of mothers who have not been abused (World Bank 2011a).

This report provides a frame of reference to help understand and move toward social inclusion. It is intended for policy makers, academics, activists, and development partners—indeed, anyone who is curious about what inclusion can mean and how it can be addressed in a world that is in the throes of formidable transitions. Although it does not provide definitive answers, it offers a definition and a framework to help advance the agenda of social inclusion. It builds

Photo: Simone D. McCourtie / World Bank

on the Bank's previous analytical work on themes that have touched upon social inclusion. It also draws on a review of relevant literature, analysis of survey data, some new qualitative work, and policy engagement with select countries.

This report is the Bank's first comprehensive examination of inclusion. It is certainly incomplete. It is hoped that this first effort prods and inspires further research by social scientists to broaden the understanding of the causes, consequences, and remedies of exclusion.

There are seven main messages in this report:

1. Excluded groups exist in all countries.
2. Excluded groups are consistently denied opportunities.
3. Intense global transitions are leading to social transformations that create new opportunities for inclusion as well as exacerbating existing forms of exclusion.
4. People take part in society through markets, services, and spaces.
5. Social and economic transformations affect the attitudes and perceptions of people. As people act on the basis of how they feel, it is important to pay attention to their attitudes and perceptions.
6. Exclusion is not immutable. Abundant evidence demonstrates that social inclusion can be planned and achieved.
7. Moving ahead will require a broader and deeper knowledge of exclusion and its impacts as well as taking concerted action.

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Clarifying Concepts

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Although there is general agreement that social inclusion matters, there are few terms as abstract and political as *social inclusion*. It is notoriously many things to many people. Although it is true that the term is more political than analytical (Øyen 1997), it is also true that it has its roots in identifiable models of welfare and in principles of social justice and human dignity.

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This report proposes defining social inclusion in two ways. The first is a broad sweep to guide policy makers. It states that social inclusion is:

The process of improving the terms for individuals and groups to take part in society.

2

A second, sharper definition takes into account how the terms of social inclusion can be improved and for whom. It articulates social inclusion as:

The process of improving the ability, opportunity, and dignity of people, disadvantaged on the basis of their identity, to take part in society.

People often find it easier to explain what social exclusion is. Yet even social exclusion is often lumped with the related concepts of poverty and inequality. Social inclusion may well be about reducing poverty—but it is often about more than poverty, and in some cases, it is not about poverty at all. Take the case of a homosexual man living in a rich neighborhood in any of several African countries. He may not be poor, but he is certainly excluded—and in some countries, at risk of death. Exclusion can intersect with poverty, deriving from a set of multiple, interrelated disadvantages that result in both economic and social deprivation (Silver n.d.). Understanding that “the poor” are not one homogeneous mass but are rather differentiated on the basis of occupation, ethnicity, place of residence, or race is central to developing effective inclusive policies.

Social inclusion takes poverty analysis beyond identifying correlates to uncovering its underlying causes. It asks questions such as *why* certain groups are overrepresented among the poor and *why* some people lack access to education, health, and other services or receive

poorer-quality services. It exposes the multidimensional nature of chronic deprivation arising from social exclusion, which plays a key role in driving the more readily observable correlates of poverty (lack of schooling, poor health, and constrained labor market returns). It underscores that deprivation arising from social exclusion tends to occur along multiple axes at once, so that policies that release just one of these axes of deprivation, such as improved access to education, will not unleash the grip of others. It draws back the curtain on the norms and belief systems that underpin this multifaceted exclusion, which may be overt norms, such as apartheid in South Africa, or the result of intangible belief systems handed down through history.

Social inclusion is also not the same as equality. The term *social inclusion* can add to the idea of equality, but much more importantly, it can explain why some inequalities exist or why some are particularly durable (Tilly 1999). There are many ways that people can achieve fuller participation and inclusion, even if they lack an equal share of resources. At the same time, even people at the higher end of the

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income distribution may face social exclusion through political persecution or discrimination based on age, gender, sexual orientation, or disability (Warschauer 2003). So exclusion can be horizontal, affecting several members of a group, whether poor or rich. It is a process, of which inequality is sometimes, but not always, an outcome.

Practitioners of development, who sometimes consider social inclusion too esoteric an idea, often ask how it could be quantified. How would one know when exclusion takes place and when inclusion is achieved? Such measurement is indeed important to establish the extent and depth of exclusion and to monitor progress toward inclusion.

There has been considerable progress in the area of measurement of human well-being, if not social inclusion, more directly. In fact, “happiness-based” conceptualizations of societal progress go back

to the writings of Bentham and Mill. But over time, attention moved away from happiness to the measurement of real production (Galbraith 1998; Sen 2000). In recent years, there have been several significant initiatives to measure societal progress more comprehensively, and many have incorporated subjective reports of well-being.

The test of moving toward social inclusion is to move forward from the metrics to *ask why* certain outcomes obtain for certain groups, to focus on the drivers and processes of those outcomes. Doing so means persevering with questions, not being content, for instance, with the knowledge that certain groups are overrepresented among the poor or that some have worse human development outcomes, but rather *asking why* this is the case. It means building consensus around difficult answers that such questions will inevitably throw up. The narrative that is constructed as a result is the most important way in which social inclusion can have meaning.

Who Gets Excluded and How?

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*The eyes of others our prisons,
their minds our cages.*

—Virginia Woolf,
“An Unwritten Novel” (1921)

Individuals and groups are excluded or included based on their identity. Among the most common group identities resulting in exclusion are gender, race, caste, ethnicity, religion, and disability status. Social exclusion based on such group attributes can lead to lower social standing, often accompanied by lower outcomes in terms of income, human capital endowments, access to employment and services, and voice in both national and local decision making. Gaps between the attainment of males and females in a range of outcomes are well documented. People of African descent are still excluded in a variety of cultures. The caste system, peculiar to India and Nepal, stands out as an “ideal type” of exclusion, complete with an ideology and a hierarchy that has persisted through millennia. Religion continues to be a serious driver of exclusion. And indigenous people around the world continue to face exclusion that is rooted in large part in their displacement from their traditional lands (Hall and Patrinos 2012).

Some identities that were not acknowledged as sources of social exclusion or inclusion some decades ago are acknowledged as such today. They include sexual orientation, nationality, and HIV/AIDS. The lesbian, gay, bisexual, and transgender (LGBT) community, for instance, is targeted for exclusion in many, if not most, cultures. With huge waves of migration, both within countries and across them, the identity of migrant groups and individuals has come under special scrutiny, especially in developed countries, which are grappling with ways of integrating nonnatives.

Individuals are members of different groups at once and may be excluded through one of their identities but not another. The notion of “intersectionality” is based on the understanding that people are simultaneously situated in multiple social structures and realms (figure 1). However, when they intersect, identities can produce a

multiplication of advantage or disadvantage. For instance, the intersection of gender, age, ethnicity, and place of residence can have significantly more deleterious effects than the effects of gender alone. Take the case of Bolivia, which has high levels of secondary school attainment. Figure 2 shows that being a Spanish-speaking woman in Bolivia reduces the probability of completing secondary education by 5 percentage points, compared with being a Spanish-speaking man. If this Bolivian woman were a man who belonged to the Quechua people, the probability of completion would decline by 14 percentage points. If she were a Quechua woman, it would decline by 28 percentage points. Similarly, the intersection of social and spatial characteristics is a common marker of disadvantage.

Groups are heterogeneous, so exclusion within groups exists as well. Characteristics of some members of the group, such as socioeco-

Figure 1: People Have Multiple, Intersecting Identities

Note: Figure shows illustrative example of types of identities. The size of each bubble denotes the importance of an identity, which can vary across individuals, groups, and even the same individual over time.

Figure 2: Intersecting Identities Transfer Cumulative Disadvantage: Secondary School Completion in Bolivia

Source: World Bank, based on data from Minnesota Population Center 2011 and Bolivian National Institute of Statistics 2001.

Note: Figure shows secondary school completion marginal effects, using men and Spanish mother tongue as reference group, for people 25 years and older, controlling for age, age-squared, and urban/rural residence. All values are significant at the 1 percent level.

conomic status, place in the life cycle, or circumstances (such as widowhood), can also bestow advantage or disadvantage. Where social security systems are primarily informal, many elderly people are now at risk of ill treatment. Similarly, without concerted action on poverty, employment, and human development, countries with large youth cohorts are not being able to realize their “demographic dividend.” Skin tone can matter as well; individuals within the same race or ethnicity (indeed even within the same family) who have lighter skin appear to have better outcomes, ranging from chances of getting married (especially of women) to employment (Villarreal 2010; Hersch 2008; Jha and Adelman 2009).

Exclusion plays out through both tangible and intangible practices and processes. Although it is most evident in differences in “tangible” outcomes, it is rooted in intangible social norms and beliefs,

which in turn lead to stereotypes, prejudices, and stigmas. These intangible features are socially constructed and played out by both the excluder and the excluded. For example, stereotypes about groups can be so ingrained in the labor market that hiring managers or peers do not even realize that they have them (see Deshpande and Newman 2007; Loury 1999) or may not consider them stereotypes but facts. Stereotypes of “lazy” Roma or of women having low commitment to the labor market are so internalized by the majority that they are often regarded as truisms, even though they are not borne out by data on labor force participation (de Laat 2010). Sometimes the words that describe certain practices say a lot about the social acceptance of exclusion. For instance, the term *eve teasing* is used in South Asia as a flippant euphemism to signify sexual harassment of women in public places, and both the term and the practice are treated with the same indulgence.

Inclusion in What and How?

This report provides an illustrative set of interventions, but any policy or program can be designed and implemented using a social inclusion lens.

Individuals and groups want to be included in three interrelated domains: markets, services, and spaces (figure 3). The three domains represent both barriers to and opportunities for inclusion. Just as different dimensions of an individual’s life intersect, so do the three domains. Intervening in one domain without consideration of the others is likely to be one of the most important reasons for the limited success of inclusion policies and programs.

Markets

In their day-to-day interactions, people engage in society through four major markets—land, housing, labor, and credit—all of which intersect at the individual and the household level. Land, for instance,

has been a historical driver of exclusion. The roots of exclusion of indigenous populations the world over, for instance, lie, in significant part, in the appropriation of their lands by their colonizers or by other nonindigenous groups. Major social upheavals have been caused by unequal agrarian relations, which at once straddle land and labor markets. In many parts of the world, women’s historical lack of access to land has underpinned their lack of enforceable property and other rights. Exclusion from access to land affects both rural and urban populations. Urban land markets are notoriously skewed in favor of the rich and powerful; laws that govern their use and sale have been, of late, the subject of considerable debate. One of the manifestations of exclusion from urban land markets is unequal access to housing, with negative externalities in other areas. On the side of inclusion, land ownership can confer status and security (see Deininger and Feder 1998; Carter 2000).

Like land markets, labor markets are crucial sites for the play of social relations. They reflect the existing and historical inequalities in a society and are tied up with social stratification (see Polanyi 1944).

Figure 3: Propelling Social Inclusion: A Framework

For instance, slavery was at its core an occupational division of labor, with slaves working on farms and plantations. Caste, similarly, is a system of occupational segregation that became a form of social stratification, systematically excluding certain groups.

Disparity in labor market outcomes is most visibly demonstrated by the gap in earnings between preferred and excluded groups. In a study of 18 Latin American countries, Ñopo, Atal, and Winder (2010) find sizable gender and ethnic wage gaps between indigenous and nonindigenous populations. Occupational segregation by race, ethnicity, and gender is pervasive and contributes to the exclusion of certain groups from preferred jobs.

Land and labor markets are intricately linked to credit markets, especially in developing societies. The most extreme form of coalescence between the three types of markets is forced labor, which still persists in many countries. In Nepal, for instance, as part of the *Kamaiya* and *Haruwa/Charuwa* systems, indebted families, often from the historically disadvantaged castes, pledge themselves or their children to work because they cannot pay debts to moneylenders, who are often also landowners. Such labor arrangements involve agricultural workers agreeing to bondage in return for advance payments of salary from landlords at rates far below minimum wages or in lieu

of loans at very high interest rates. Workers attached to the labor market through bonded labor mechanisms are rarely able to accumulate sufficient savings to repay the bond and are thus effectively in serfdom for the remainder of their lives. The transition from bonded labor to greater labor freedom is fraught with risk, because freedom severs connections with former “employers,” who are also “patrons,” who in addition to providing employment provide housing, protection, and in-kind transfers (World Bank 2011b).

The global push toward “financial inclusion” may be overtly about the penetration of financial instruments into untapped markets, but it is equally about social inclusion. Social assistance and wages, even for unskilled workers, are increasingly being channeled through banks and other formal payment mechanisms. Under these circumstances, lack of access to financial systems becomes an important axis of exclusion. Financial services are, moreover, increasingly tied up with access to digital technology, such as smart cards and automatic teller machines, which may create an additional layer of exclusion for individuals and groups that are either uneducated or otherwise already disadvantaged. Only 15 percent of adults in fragile and conflict-affected states have bank accounts (Demirgüç-Kunt, Klapper, and Randall 2013). In more developed financial markets, too, broad economic shocks and poor access to credit can hurt minorities disproportionately, as evident in the mortgage crisis in the United States, where African Americans and Latinos were disproportionately affected relative to their share of mortgage originations (Bocian, Li, and Ernst 2010).

Services

Access to services is essential to improving social inclusion. Health and education services enhance human capital. Social protection services cushion vulnerable groups against the effects of shocks and promote their well-being. Transport services enhance mobility and connect individuals to opportunities. Water and sanitation are essential for good health. Access to energy is important for livelihoods and for human capital. And information services enhance connectedness and allow individuals to take part in the “new economy.”

Overall, subordinate groups tend to have lower access to basic services. In rural areas of the Lao People’s Democratic Republic, for example, estimates suggest that a higher proportion of women from the excluded community (non-Lao-Tai) never attended school (34 percent compared with 6 percent of Lao-Tai women). Men from the excluded group fare better than women but still worse than the majority group: 17 percent of non-Lao-Tai men never attended school compared to 4 percent of Lao-Tai men. Disparities are also visible in access to health services. In Vietnam, where poverty reduction has been impressive, indigenous peoples are less likely to be covered by health programs or receive vital vaccinations, despite impressive improvements in overall access to health (Hall and Patrinos 2006, 2012). Data from African countries show that groups that speak minority languages as their mother tongue typically have lower access to services such as water and electricity. In Uganda, for instance,

Figure 4: Access to Electricity Varies by Ethnicity in Uganda, 2010

Source: World Bank, based on data from the Uganda Demographic and Health Survey 2011 (UBOS and ICF 2012).

Note: Names of ethnic groups appear as they are in the survey.

where electricity coverage is low in general, almost half the Muganda respondents in the 2011 Demographic and Health Survey (UBOS and ICF 2012) reported having electricity, but less than 5 percent of the Lugbara and Ngakaramajong did (figure 4). Similar results show up in self-reported water insecurity from the Afrobarometer: the Langi, the Ateso, and the Alur report the highest incidence of having experienced water insecurity “most or all the time,” and the Mutooro, Mukiga, and Munyankole are most likely to report never having experienced such insecurity.

Spaces

Physical spaces have a social, political, and cultural character that solidifies systems and processes of exclusion. The most overt example of exclusion is when physical spaces are reserved for dominant groups, such as whites-only clubs during apartheid in South Africa or during slavery in the United States. The literature suggests a subculture created by dominant groups in the United States to implicitly exclude minorities even when they can afford to buy homes in their neighborhoods. Neighborhoods thus become “white” or “black”; the term “white flight” is used to document the departure of white families when black people start to move into their neighborhoods. Black neighborhoods are often considered poor or “bad” or unsafe, reflecting at once a judgment on their social and economic character. Similarly, there is evidence to suggest that Dalits in India and Nepal are still sometimes barred from entering temples and other physical spaces that are considered “pure.”

Excluded groups can react to their disadvantage by claiming certain spaces. Clustering in certain geographical areas can serve as op-

portunity enclaves for the excluded, who, when excluded from the primary market, concentrate in markets for the excluded and use them for social and economic mobility (Wilson and Portes 1980; Portes and Jensen 1989). This phenomenon has been documented, for instance, for Cubans in Miami and other immigrants, who skirt labor market discrimination by consolidating their positions in clusters of the excluded. Not all strategies of clustering necessarily lead to social mobility, however. The perverse impact of clustering is illustrated in differential child mortality patterns in Ghana, where the Ga have higher levels of mortality than other ethnic groups. Weeks and his colleagues (2006) found a close association between differences in child mortality (by ethnicity) and residential clustering in Accra.

Because social inclusion is also at its core about accountability of the state to its citizens, it is as much about occupying political space as it is about having an equitable share in markets and services. It is not just poor people or traditionally excluded groups that demand greater political space and voice. Increasingly, educated people who feel excluded from a range of spaces are clamoring for greater participation. Poverty and minority status often compound the lack of access to political space. Many countries have seen a rolling back of state power since the 1980s, accompanied by a widening of economic opportunities. Yet state power continues to underpin many processes of exclusion and inclusion, and rent-seeking becomes an important process of exclusion. For instance, the power to award mining leases or to sit in positions that can influence public sector hiring offers ample scope for consolidating social, political, and economic space. Although politicians do not necessarily or exclusively favor their own ethnic or cultural group, groups with little or no political representation risk their interests being excluded from consideration (Marcus et al. 2013).

Enhancing Social Inclusion by Improving Ability, Opportunity, and Dignity

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Ability

This report uses the ideas of ability, opportunity, and dignity and applies them to excluded groups. Ability, for instance, is innate to individuals, but, when measured through achievement tests, it may not always be randomly distributed. Instead, it may be socially mediated. A child who performs poorly on standardized tests at an early age may be affected by a range of background processes. These processes can include the fact that she was born with low birthweight to a very young mother and may not have had the parental stimulation that her peers in more advantaged circumstances had. These cumulative disadvantages are often systematically distributed by race, ethnicity, or place of residence. The literature on early childhood education indicates that the brain starts to develop in utero, and although brains are elastic enough to compensate for maternal or other in utero deprivations, they may not be able to fully do so. In addition, when children are deprived of stimulation and nutrition in the early months and years of life, their development is permanently affected.

The ability of an individual is also affected by the people she sees around her and whom she regards as reference models. Borjas (1992) outlines the notion of “ethnic capital” to show that individuals who are members of high-performing groups tend to perform better. This report argues that reference groups and role models are important in the “capacity to aspire,” to use Appadurai’s term. When individuals from disadvantaged groups see others around them performing at a low level, they set a much lower bar for themselves than they would have if they had belonged to a high-performing group. In addition, they may internalize exclusion in such a way that they

do not even bother to try for better outcomes, knowing that people from their group are discriminated against. Elmslie and Sedo (1996) propose the idea of “learned helplessness” to show that negative events, such as an episode of discrimination, can lead to a decrease in learning ability. Exclusion, therefore, can create resignation at both the group and the individual level, which in turn diminishes human capital, constrains effort, and becomes somewhat of a self-fulfilling prophecy.

Opportunity

Inequality of opportunity is one of the major constraints to the realization of human potential. Recent work on the Human Opportunities Index (HOI) underscores this and focuses policy attention on investments that equalize opportunities at the beginning of the life cycle. The underlying assumption is that equalizing the supply of services will provide all individuals with an equal chance of translating their capabilities into enhanced well-being.

Providing full opportunity is not only an institutional challenge in many countries; the process of expanding opportunities can itself be exclusionary, constraining both the supply of and demand for opportunity.

Take the case of health facilities in remote areas where indigenous women live. The remoteness of their habitations means that providing them with the same quality and quantity of services as available to their urban counterparts is fiscally and institutionally challenging.

Photo: Richard Brice / World Bank

The placement of health centers often depends on the political voice of the residents, and some of the most remote residents also have the weakest voice. Even if facilities are available, quality can be uneven, because medical staff are often absent. Finally, there is also “low demand” for facilities, for a number of reasons, including the indignity and humiliation meted out by service providers, which deter women from wanting to go to the facility.

Opportunity can also be mediated by special needs. For example, some groups may require remedial efforts to provide them with the same degree of opportunity, because of their initial conditions, which include their innate characteristics (for instance, disability status). An estimated 12–16 percent of all children in the United States come into the school system with a disability that hampers their ability to learn (AAP 2001). Children with disabilities who receive targeted support in addition to schooling are more likely to graduate, gain employment, and live independently (Shonkoff and Meisels 2000). Yet remedial services are often deficient, mirroring the wider social, economic, and political exclusion of people with disabilities (Yeo and Moore 2003). The situation for children with disabilities in less developed countries is even more adverse. What is the likelihood that they will be presented with equal opportunities?

Finally, opportunity changes over the life cycle. Equalizing opportunities at the beginning of life does not ensure the capacity for equal outcomes over time. There are critical junctures in the life cycle, such as entry into the job market from school and during future job searches for career advancement, where both demand and supply factors play an important role in reallocating opportunity. There are also cata-

strophic and unforeseen events, such as economic crises and natural disasters, which work to reallocate opportunity, with unequal impacts on population subgroups. In the recent financial crisis in the United States, for instance, black people were twice as likely to become unemployed than whites, and it took them much longer to regain employment (Lynch 2012). At the individual level, events such as accidents or a death in the family can forever alter access to opportunity.

Dignity

This report brings the idea of dignity into the lexicon of the World Bank Group. The idea that dignity matters for individuals and groups is not new for development theory. The word *dignity* is mentioned in several human rights covenants and charters. Amartya Sen’s idea of capabilities encompasses the notion of human dignity.

Dignity as it relates to social inclusion is intrinsically linked to notions of respect and recognition. When, through their institutions and norms, dominant cultures and processes actively disrespect individuals and groups who are considered subordinate, those individuals and groups can either opt out, submit, or protest.

The lack of recognition can render some individuals and even entire groups “invisible” in official statistics. For instance, in many cultures, a disabled member of the household is not reported in the household when survey personnel conduct interviews. In other cases, people such as refugees who cross borders without documents may actively avoid official contact. Other unrecognized people include stateless

Figure 5: Migrants in Urban China Speak of “Being Looked Down upon” by Locals, 2011

Source: Shi 2012.

Note: Based on responses to the question, “Do you agree with the view that migrants are always looked down on by locals?” in the 2011 Migrant Survey conducted by the National Health and Family Planning Commission of the People’s Republic of China.

people and even legal citizens who lack documents to prove their residency or eligibility for various benefits. In still other cases, such as the Roma in many European countries, the excluded group hides itself from official surveys and censuses so that it can meld into the statistics of the majority. In figurative terms, dignity and recognition are linked to the way subordinate groups are treated by dominant groups and by the state. This treatment includes contempt for their cultures and practices and intentional or unintentional stereotyping that prevents them from fully taking part in society.

Tools are being developed to measure when individuals are being accorded dignity or treated without it. The empirical literature on dignity has been led by medical ethicists and advocates of respectful treatment of patients, especially the terminally ill, the elderly, and people with significant physical and cognitive impairments, at the hands of medical providers. For example, using data from the Commonwealth Fund 2001 Health Care Quality Survey of 6,722 adults living in the United States, Beach et al. (2005) analyze the association between two measures of respect (involvement in decisions and treatment with dignity) and patient outcomes (satisfaction, adherence, and receipt of optimal preventive care). After adjusting for respondents’ demographic characteristics, they find that people who were treated with dignity had a higher probability of reporting satisfaction. As measures of dignity are still being developed, the terms *dignity*, *respect*, and *recognition* are often used interchangeably.

A recent survey in China of 128,000 migrants in urban areas asked respondents whether they thought migrants were “always looked down upon” in the cities in which they lived. Between one-third and one-fourth of respondents thought they were always looked down upon by locals—a finding that varied little with age or education level (figure 5). Feelings of being looked down upon increased with length of stay, suggesting that migrants encountered unpleasant behavior if they stayed long enough and interacted with more people (Shi 2012).

The Changing Context for Social Inclusion

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Much of today's global political upheaval can be linked to demographic, spatial, economic, and knowledge transitions that are transforming societies. The cumulative impact of the transitions of the past several decades has changed the profile of the global community and reshaped some of the social inclusion issues. The cumulative impact of these large-scale transitions has changed the context for inclusion by creating new opportunities for both inclusion and exclusion.

Complex demographic transitions have significant social impacts. Lower fertility and mortality rates are transforming age structures and living arrangements. Increasing numbers of the elderly mean that countries have to provide new ways of dealing with a large new cohort. Globally, the youth cohort is the largest in history, living mostly in developing and conflict countries. Population "pyramids" (box 1) are history. Consequently, reaping the demographic dividend requires concerted action to include young people in markets, services, and spaces, as well as skillful management of the political economy.

Additionally, current trends suggest that migration is likely to become a more dramatic and volatile demographic process than fertility or mortality. Europe is the largest hosting region. Its fertility rate is below replacement levels, indicating that unless birth rates rise over a sustained period, it will continue to have to import labor.

Migration within countries is also becoming larger in size and significance. The ongoing internal migration in China, for example, is the greatest and fastest movement of people in history, creating, among other things, shortages of urban services. Simultaneously, natural disasters, war, human trafficking, and economic recession are affecting migration patterns. All of these trends have a bearing on inclusion. For example, some countries and regions are witnessing high levels of hostility and resistance to migrants.

Urbanization was one of the most dramatic transitions of the previous century, and it will continue to unfold in the present one. At the individual and household level, urbanization offers the possibility for social mobility through a range of new opportunities. Migrants from rural areas move to cities and towns seeking new jobs, business opportunities, and education. Cities and towns also offer a differ-

ent social milieu. Old norms and values give way to new and more diverse ones. However, not all social processes in urban areas are necessarily positive for excluded groups. Cities are increasingly polarized between people who have access to basic services and people who do not.

The slums in Brazil, known as *favelas*, are a case in point. Recognizing that *favelas* are a visual testimony to the country's inequality, Brazil adopted a mantra of moving from "divided cities" to "integrated cities."

Inequality within cities is also one of the root causes for the crime that has beset many cities. Over time, violence can become institutionalized, making it difficult to dismantle. Governance challenges in urban areas contribute to some groups feeling left out and having few opportunities for voice and redress. Core government functions can be taken over by land mafia, drug lords, and other extortionists. Mental health issues, substance abuse, and poor security all affect individuals more negatively in urban areas. Excluded groups live in areas that expose them to these negative factors more intensely.

One of the most profound transitions of this century is occurring as a result of climate change. It is already having rapid and catastrophic consequences on livelihoods, crops, and ecosystems. A recent report portends a scenario of a world that will be 4°C warmer in 2100 than in preindustrial times, leading to catastrophic heat waves, droughts, and floods in many regions (World Bank 2013a). Periods of climate-related stress, such as a drought, affect food availability, with people in conflict-affected areas hit hardest. Sen (2001) argues that food insecurity during periods of climatic stresses is higher in countries affected by conflict, because, unlike peaceful countries, regimes in conflict end up spending more on the military than on social programs and have poorly functioning markets and services. Conflict can affect agricultural production, for instance, by blocking the ability to import (UN 1993), by preventing access to farmlands and removing men from farming. These fragile populations often take refuge in countries with greater food security, but their presence can exacerbate tensions.

Box 1: Population Pyramids Are History

Transitions in fertility and mortality and uneven migration patterns will make population pyramids extinct by 2050, in all except the very high fertility countries. Figure B.1.1 shows age structures of three very different contexts: Uganda, where the fertility transition has been slow and late; Poland, which has very low fertility and low mortality; and the Arab Republic of Egypt, which falls in between these two scenarios. The pyramids show that by 2050, half of Uganda's population will be below 20 years of age; Egypt's population, which is young now, will be older and replaced by a much smaller cohort of young people; and Poland will have a full-fledged aging crisis. Each of these three scenarios underscores the need for planning and vision.

Figure B.1.1 Population Pyramids in Uganda, Poland, and the Arab Republic of Egypt, 1950, 2010, and 2050

Source: World Bank, based on data from UN 2011.

Photo: JP Keenan / World Bank

In tandem with, and underlying, other transitions over the last few decades are deep economic transitions. Globalization and regional integration, coupled with substantial reforms at the national level, have led to impressive growth and poverty reduction across the globe. As a consequence, a large cohort has now “graduated” to the middle class (Ferreira et al. 2013; Kharas and Gertz 2011; Dadush and Shaw 2011), implying a change in societal values and aspirations. The middle class is often the harbinger of change. Its support is critical to achieving the goals of social inclusion, partly because the relationship of the middle class to the state is quite different from that of the poor to the state. The middle class demands voice and accountability as a right; the poor can often be reduced to a supplicant by a strong state. Simultaneously, revolutions in knowledge, social networking, and citizen action have shown that aspirations, when unfulfilled, can create unique challenges for governments. Although inequality trends are highly heterogeneous across countries, income inequality is growing in the most populous countries like China and India. Finally, food security remains a challenge for most developing countries, with excluded groups and people who live in remote areas at greatest risk.

Education is another powerful force that is also changing the social context. Education is the unparalleled agent of social change and one that has expanded across the board, even in the poorest countries. A

new cohort of young people has attainments, aspirations, and hopes that are quite different from those of their parents’ generation.

In Sub-Saharan Africa, for instance, there was a fivefold increase in gross secondary school enrollment, from 7 percent to 36 percent, between 1970 and 2009 (WDI database). At the global level, the corresponding figure nearly doubled, from 36 percent to 68 percent. Education changes relationships of power within society and within households. Groups that were considered subordinate acquire voice and confidence when they are educated. They tend to be more assertive in holding the state and service providers accountable and in demanding dignity and respect from groups that were considered dominant. At the household level, educated young women have greater say in decision making and are able to access opportunities outside their homes in ways that their mothers never did. Their education changes intrafamily power relations.

A large body of literature focuses on the enormous impact that education can have on women’s inclusion into markets, services, and spaces. When young women in Bangladesh were asked during focus group discussions how education had changed their lives, they poignantly described “being able to speak” as the most important gain (World Bank 2008). Yet ensuring decent quality of education remains a challenge. Additionally, educational institutions can be important spaces of exclusion.

*Men are disturbed not
by things, but by the view
which they take of them.*

—Epictetus

Attention to Attitudes and Perceptions Is Important in Addressing Social Inclusion

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Attitudes and perceptions matter for social inclusion because people act on the basis of how they feel. Their feelings of being included and respected are central to the opportunities they access and the ways in which they take part in society. Conversely, which groups get included and excluded, and on what terms, is shaped by people's attitudes about each other and about themselves.

The importance of attitudes and perceptions also spills over to levels above the individual. A large body of literature shows that prejudices, stereotypes, and misperceptions affect the way policy is implemented and even designed. This report shows that attitudes play a key role in the treatment of individuals and groups, both by other members of the society and by the state. Attitudes and perceptions also mediate social inclusion and shine a light on the processes through which exclusion takes place. Perceptions of unfairness and injustice and frustration with social and political institutions or with the society at large often reflect individuals' feelings of powerlessness. Feelings of fairness, justice, and "being part of society" can be manifestations of how much the society recognizes, respects, and listens to its members.

People's attitudes are often related to outcomes. Attitudes toward women's education, access to jobs, and leadership positions have a strong association with poor outcomes for women. Analysis of the World Values Surveys data conducted for this report, for instance, finds an inverse relationship between gross tertiary school enrollment rates for women and negative attitudes toward higher educa-

tion for women. In Australia, New Zealand, and some Scandinavian countries, tertiary school enrollment among women is almost universal, and discriminatory attitudes toward access to higher education are very low. Attitudes regarding women's access to jobs are far less favorable in countries that have the lowest female labor force participation rates (less than 20 percent), including Egypt, Iraq, Saudi Arabia, Pakistan, Algeria, Jordan, and the Islamic Republic of Iran (figure 6). There also seems to be a relationship between attitudes toward women taking up leadership positions and their becoming leaders. Countries where fewer respondents say that men will make better political leaders are also the ones with the highest share of women parliamentarians (for example, Andorra, Sweden, Canada, Finland, Argentina, and the Netherlands).

Attitudes and perceptions are shaped by history, culture, and the way institutions have evolved over time. Take the case of perceived inequality and its acceptance in societies. Analysis of the World Values Surveys data conducted for this report suggests a nonlinear relationship between the extent of aversion to inequality and observed inequality. Australia and many countries in Europe have both low inequality and a low appetite for it. Some countries in Latin America (for example, Chile, Argentina, Uruguay, and to some extent Brazil) have high levels of measured inequality, but their aversion to it looks quite similar to other countries with much lower levels of inequality.

Citizens' views about the extent of fairness in their country often reflect deeper issues of inclusion and exclusion in society. This report

finds, for instance, based on data from the Afrobarometer, that a majority of citizens in African countries feel that their country treats people unequally. This finding may be indicative of the fact that exclusion is a problem for many, rather than a few, and that the state is perceived as catering to the needs of a small section of society.

Perceptions about unfairness in Africa are substantiated by other trends in some countries. Africa's economic growth over the past decade was driven largely by mineral extraction, with the benefits concentrated among a few. Economic power is closely related to political

power and representation in decision making, which in turn affects the allocation of public expenditure and can lead to disparities in opportunities. Income inequality, for example, has risen considerably in the last three decades throughout Sub-Saharan Africa. In 2010, Africa was the second most unequal region in the world (after Latin America), and 6 of the world's 10 most unequal countries worldwide were located in Southern Africa (AfDB 2012). Perceptions about inequality in non-African contexts may be shaped, similarly, by underlying trends in those contexts.

Figure 6: Countries and Areas Where People Say Men Have More Right to Jobs Also Have Lower Labor Force Participation Rates for Women, 2005–08

Sources: World Bank, based on data from World Values Surveys 2005–08 (attitudes) and World Development Indicators 2005–08 (female labor force participation).

Note: Values correspond to data that were available for both variables within a span of two years. Data are latest available between 2005 and 2008.

Social Inclusion Can Be Achieved

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This report is an unequivocal statement that change is possible, that policy makers, activists, development partners, and others who care about justice and shared prosperity can steer change toward social inclusion. Exclusion is not embedded in culture and immutable. Change may happen by stealth or by design. It may happen through discrete events or through gradual processes that culminate over time.

Change is rarely linear. Attempts to make change inclusive may involve tradeoffs, creating both winners and losers. There can be push-back from the dominant groups when previously subordinate groups feel included and break the norms. Push-back can come with active retaliation, setting back the process of change.

Examples of change toward inclusion abound in history. South Africa, for example, moved from institutionalized segregation toward an ideal of a “rainbow nation” in a matter of two decades. Foot-binding, an ancient tradition in China, was curtailed and eventually disappeared following an intense social campaign and prohibition by law. The articulation of social exclusion in Brazil that started with a widespread belief in a “racial democracy” came to accept that discrimination on the basis of race has held some groups back. The exclusionary system of informal local justice in Bangladesh, the *Shalish*, has been transformed by greater voice and participation. In a region where women’s role in society is confined to the private sphere, higher educational attainment among women in Jordan has become the rule rather than the exception.

The state has the preeminent role in promoting change toward inclusion, but other actors play important roles too. In fact, it is the interplay of state and nonstate actions that leads to inclusion. Catalysts and champions of change toward social inclusion, for instance, often come from the elite. The abolition of slavery in the United States, the end of foot-binding in China, and the end of apartheid in South Africa were all the product of social movements led by elites. Some of them came from excluded groups, as in the case of South Africa; others came from dominant groups, as in the case of the United States. In many countries, the role of religious leaders in both resisting and propelling change has been considerable. The role of business leaders in promoting social inclusion is also well recognized. Finally, civil society movements and collective action by excluded groups have

*A new and sweeping utopia of life ... where
the races condemned to one hundred
years of solitude will have, at last and forever,
a second opportunity on earth.*

—Gabriel García Márquez,
Nobel Acceptance Speech

historically pushed agendas for social inclusion by taking up specific “wrongs” that society needs to correct. More recently, the media has been known to play a significant role in changing mindsets and creating awareness against exclusion (Trujillo and Paluck 2012).

Moving from exclusion to inclusion does not happen overnight; it is important to have a long-term view. Social inclusion requires overcoming negative beliefs and stereotypes about excluded groups, which cannot be undone in a few years of “inclusive policy.” Timing is therefore of the essence; the impacts of some changes may be felt years into the future or may well be the unintended consequences of policy or other developments. Similarly, the impact of change on groups can vary, and what is considered costly for some groups today may have positive outcomes in the future or vice versa.

Countries that are successful in addressing social exclusion usually have strong institutions. The strength of institutions lies in large part in their agility and malleability in addressing new needs of social inclusion. Take the case of Sweden, often held up as a shining example of social inclusion. Today the country is grappling with the challenges of immigration. Its institutions, which have historically responded positively to social and economic challenges, now need ways to accommodate a more heterogeneous population than Sweden has been used to. Institutions, in turn, are influenced by historical circumstance and can often be intractable to change as a result.

What Can Policies and Programs Do to Enhance Social Inclusion?

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How do policies that are effective in addressing social exclusion differ from ordinary social policies? In essence, social inclusion policies are policies that do not necessarily do more but that do things differently. No single set of policies or programs can be classified as “social inclusion policies” or “social inclusion programs.” In fact, depending on the “wrong” that needs to be addressed or the “right” that needs to be deepened, a range of interventions could be employed. This report provides a few examples of interventions within the broad typology of markets, services, and spaces, but any policy or program can be designed and implemented with a social inclusion focus.

Often the same policy or program can cut across different domains—market, services, and spaces. Policies toward social inclusion need to be connected or cross-sectoral. Social exclusion is a multidimensional process in which practices in one domain lead to or reinforce exclusion in another domain. Policies to address social exclusion therefore require what Silver (2013) calls “a dynamic sequence of interventions.” Illustrating her argument with the case of the homeless, she argues that their inclusion in society requires a “continuum of care” starting from transitional housing, labor market training, and (possible) drug and alcohol treatment to (eventually) permanent housing, perhaps with long-term supportive services to help them stay housed. This report categorizes interventions into the domains of markets, services, and spaces, realizing that the domains overlap and that intervening in one domain can have effects in others.

Policies and programs can intervene in a range of markets. Take the case of land reforms. Although land reforms are not by themselves a panacea for exclusion or inequality, societies that have carried them out tend to be more inclusionary. Land titles to women and de facto recognition of the communal land use patterns of indigenous populations can be effective in creating opportunity and enhancing dignity. Women in many societies do not traditionally own land. Making them

joint landholders in land redistribution or resettlement projects or reserving land use quotas can increase their access to opportunities while also empowering them. Deininger, Goyal, and Nagarajan (2010), for instance, find that coparcenary rights for women in property can have a positive effect on the education of girls within the household. Programs offering child care can enhance women’s labor market outcomes. Both women’s labor force participation rates and their wages are lower than men’s, even after controlling for a range of individual and household level factors (World Bank 2012, 2013c). Many women cannot work because of their family responsibilities, yet child care in most places is costly and scarce. Programs providing subsidized child care not only can help women improve their labor market outcomes, they also can have other positive externalities as well.

Access to services that take into account the special needs of excluded groups can go a long way in enhancing social inclusion. Subsidized fares targeted to excluded groups and accessible transport services can help connect these groups to markets, services, and spaces. The city of São Paulo has chosen flat fares as an alternative to distance-based fares in order to cross-subsidize the poor. Fares are valid across multiple modes/trips on one journey. Some groups, such as women and people with disabilities, face additional barriers to using transport (for example, inadequate street lighting leading to concerns around safety, transport that is inaccessible to people with disabilities, and so forth). Here, too, countries are experimenting with innovative methods to address the challenges these groups face in physical mobility.

The manner in which services are provided matters almost as much as the technical design of the service. Stereotypes that are often ingrained in service providers can have a damaging effect on the way they treat their clients, but these issues are not insurmountable. A growing practice focuses on “cultural competencies” among service providers. This practice is particularly advanced in health and social

Photo: Richard Brice / World Bank

work and is growing in education and other sectors. Holding providers accountable not merely for their presence and their technical skill but for cultural competence as a performance indicator is likely to go a long way toward ensuring that cultural minorities feel comfortable in accessing services.

According recognition to excluded and “invisible” groups is an important step toward their overall inclusion. For instance, many countries have weak systems of birth and death registration. Initiatives to improve these systems may not immediately conjure up images of social inclusion, but without such registration a child can often not be admitted to school and family members not permitted access to the property of the deceased. The poorest or most excluded groups cannot access benefits because they do not have identification or any means to prove that they indeed exist. Such literal recognition can come from initiatives that provide identity cards or create electronic databases or make special efforts to count people at risk of remaining invisible. Brazil’s efficiency in implementing the Bolsa Familia and related cash transfer programs stems partly from the existence of the Cadastro Único, an electronic database of program participants.

Language is an important aspect of identity and claim to political and cultural space. Language policy can thus be an important driver of both exclusion and inclusion. The status of certain languages as official languages for government or education has symbolic, political, and practical consequences. Symbolically, official status suggests that certain ethno-linguistic groups and their cultures are more valuable than others. Practically, according some languages official status can disadvantage those who are unable to communicate in them. The disadvantage may compound over generations, with children of linguistically excluded groups facing an additional barrier to access learning and jobs, public services, and democratic spaces.

Interventions that work at the cusp of social and physical space can be transformative. The city of Medellín, Colombia, stands as

a unique and innovative example of how cities can become inclusive for their citizens through both infrastructure planning and citizen engagement. Infamously known for its drug cartel, which used the city as a base for operations, the city undertook wide-ranging police and military action between 2003 and 2006 that resulted in the dismantling of the cartel and a significant decline in the number of homicides (Muse 2012). Under a new mayor, it transformed its transportation system, with cable cars running between *comunas* (municipalities or councils) previously at war (Romero 2007). Among the different urban development initiatives undertaken was the creation of new public spaces—for example, the Parque Biblioteca España and new museums—to encourage social interaction. A large part of Medellín’s municipal budget is now spent on social investments, which target vulnerable sections of the population, including older people. Several programs work on organizing youth and older adults into community action groups. These groups, which come with elected positions, help the vulnerable put forth their interests to municipalities (especially at the time of budgetary planning) and enable them to hold government entities accountable.

There is a long-standing tension between policies and programs that seek to provide universal access and those that target specific groups. Targeting can range from area-based approaches (often called “geographical targeting”) to the targeting of certain individuals or groups. Targeting criteria can include poverty status, age, disability status, gender, minority status, or a mix of these criteria. Affirmative action policies can be viewed as a form of targeting in which certain groups, by virtue of their historical exclusion, are given special treatment to enable them to catch up with the average in the population. Affirmative action can come in various forms; quotas are just one example of affirmative action. Laws that ensure equal opportunity in employment, credit, housing, and education are another form of affirmative action. In addition, the constitutions of several countries—such as Bolivia, India, Malaysia, Nepal, South Africa, and

Photo: Maria Fleischmann / World Bank

Uganda—allow for preferential policies for excluded groups to redress historical imbalances. Intended to enhance opportunities and level the playing field, these policies reserve places in public educational institutions, public employment, or legislative bodies.

Preferential policies often create a range of dilemmas and concerns. One dilemma is whether countries want to name groups, thereby “affirming” the divide. In Brazil, for instance, the establishment of quotas for Afro-Brazilians was preceded by an intense debate over whether such quotas would mean implicit recognition of race as a marker of discrimination—an idea that ran contrary to Brazil’s construct of a racial democracy. France has opted for geographical targeting of socioeconomically deprived areas rather than naming ethnic groups living in those areas. China has made impressive advances in reducing poverty and social exclusion by good geographical targeting. In the European Union accession countries, the Roma are not specifically acknowledged in affirmative action legislation but are subsumed under the overarching term of “disadvantaged groups” (Silver 2013).

A second dilemma is how to ensure that entrenched elites do not skim the benefits of quotas when resources are scarce. A related dilemma is how to prevent perverse incentives for other groups to show “weakness” and hence entitlement in order to qualify for affirmative action. A final concern is that positive discrimination policies build resentment among dominant groups, who may question the qualifications of candidates who receive preferential treatment, thereby intensifying those candidates’ stigma.

Community-driven development (CDD) is an approach that gives community groups control over planning decisions and investment resources for local development projects. Recent evidence on the impact of CDD programs suggests that when implemented well, these programs can improve service delivery in sectors such as health and education, improve resource sustainability, and help communities build lower-cost and better-quality infrastructure (Mansuri and Rao 2013; Wong 2012). Furthermore, by virtue of targeting mostly the poor and vulnerable, these programs can help bring the voice of such groups to the policy table. An impact evaluation of Indonesia’s Kecamatan Development Program (KDP), for instance, finds widespread participation of beneficiaries in program meetings, with poorer and

female-headed households as likely to attend as others (Barron et al. 2009). Several CDD programs have succeeded in improving access to spaces for the poor and building social capital. CDD programs also have the advantage of being able to innovate more readily, because they are founded on the principle of community mobilization. They thus have the advantage of flexibility and community voice that encourages the generation of new ideas.

Sometimes the impact of programs far exceeds the original intent, which may be to enhance coverage or benefits. Take the case of social protection programs. Many of these programs can also enhance the self-esteem of subordinate groups, as well as the attitudes of others toward them. In Lesotho, for example, recipients of social pensions indicated an increase in respect for them in society once the national social pension was introduced. The pension also contributed to greater self-esteem, because recipients were able to contribute more financially to their grandchildren’s upbringing and education. In Nicaragua, similarly, a conditional cash transfer program reports unforeseen positive impacts on women’s leadership (Makours and Vakis 2009).

Social grants and transfers can play a role in reducing historical disparities. In apartheid South Africa, the beneficiaries of social grants were primarily white and “colored” people; blacks received a minor share of the benefits. The postapartheid government instituted reforms such that social grants would be targeted to blacks, who were hugely overrepresented among the poor but were not receiving transfers (Leibbrandt, Woolard, and Woolard 2007). Mexico’s well-targeted Oportunidades, in addition to benefiting a much larger proportion of the population in indigenous than in nonindigenous municipalities, also decreased gender gaps in employment and reduced levels of domestic violence.

Just as some programs can have benefits that exceed their intent, others can have costs that were unforeseen. For instance, differential retirement ages for men and women in the Chinese civil service are meant as a concession to women workers, as are laws in many countries that are meant to protect young female migrants from abuse overseas by enforcing a minimum age for their departure. But both policies may have negative consequences—by excluding older Chinese women from the labor market or creating conditions for poor young women to migrate without documentation (see Das 2008, 2012).

The Right Question

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Figure 7: How to Include: Addressing the High Numbers of Maternal Deaths among Tribal Women in India

The report takes on one intractable problem—that of poor maternal health outcomes among indigenous groups—and argues that change toward social inclusion needs to start with the right diagnosis. It needs to “ask why” (figure 7).

Tribal women in India do not, for the most part, give birth in health centers. When they are asked why, the overwhelming majority of them say they do not think it necessary. Health practitioners then blame their poor health outcomes on low demand for formal health care. Continuing to ask why, however, reveals that low demand may reflect an assertion of dignity and a rejection of humiliation by excluded groups, in this case tribal women, who resent being treated badly by service providers.

Underlying the proximate reasons for poor outcomes are complex phenomena that are not immediately visible. Overall, the poor health of a tribal woman is rooted in the low power she has relative to almost everyone else in the country. Issues of land and forests are

central to her situation. Once viewed in this way, it is clear that a supply-side push for better health facilities is a relatively blunt instrument with which to address high levels of maternal mortality.

Asking the right questions is likely to lead to a different design of a social program. Questions can include the following:

- What is the “wrong” or intractable problem being addressed, or what went “right” that needs to be deepened?
- Whom does the intervention or service seek to include, and who is at risk of being left out?
- Why are those groups or areas at risk of being left out? What are the channels through which inclusion can take place?
- What innovations can be put in place to ensure inclusion? What can be done differently?

Concluding Reflections

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Human progress is neither automatic nor inevitable. Even a superficial look at history reveals that no social advance rolls in on wheels of inevitability . . . Without persistent effort, time itself becomes an ally of the insurgent and primitive forces of irrational emotionalism and social destruction. This is no time for apathy or complacency. This is a time for vigorous and positive action.

—Martin Luther King, Jr.

Although the contribution of this report to the world of ideas is an important objective, the report will be a larger public good only if it influences the world of research, policies, programs, and projects. What are the potential contributions of this report to the design and implementation of policies, programs, and projects? How does it highlight a new agenda for social inclusion?

It is hoped that this report speaks to practitioners in the following broad ways:

- It is an exhortation to both policy makers and researchers to use the term *social inclusion* with careful attention to meaning and boundaries.
- It brings some new ideas from philosophy and theory into the realm of practice.
- It highlights gaps in the understanding of social inclusion and potential areas for additional work through piloting new initiatives and undertaking new empirical analysis.
- It underscores the importance of additional work in measuring social inclusion.
- It emphasizes the importance of *asking why* poor outcomes continue to persist for some groups, before designing the instruments with which to combat exclusion.
- It stresses that building social inclusion is about building alliances and social consensus.
- It draws attention to the fact that monitoring change toward social inclusion needs innovation and that such innovation needs to be incorporated into practice.
- It is a call for greater participation of researchers to provide policy makers with the knowledge that will be essential for the wise design of social inclusion policies and programs.

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