

Companion for Chapter 7

Social Inclusion

SUMMARY

- Most countries have not achieved the three goals of sustainable development: economic development, social inclusion and environmental sustainability. Even the high-income countries struggle with rising inequalities of income, wealth and power, and with discriminations based on ethnicity, religion, race, gender, caste or sexual orientation.
- The first dimension of social inclusion addresses income and wealth inequality. The second dimension addresses discrimination through legal channels: laws in many parts of the world continue to discriminate against some groups. The third dimension involves discrimination through cultural and social norms.
- There are six important ethical approaches to social inclusion:
 - 1) Virtue ethics, best exemplified by the Buddha, Confucius, and Aristotle, call on individuals to cultivate a set of attitudes and behaviors appropriate to societal life that achieve well-being. Our material desires are poor guides to long-term well-being. Instead, compassion, moderation, and mindfulness mark the true path towards it.
 - 2) A second philosophical view arises from the three great monotheistic religions. Judaism, Christianity, and Islam all champion the Golden Rule: "Do not do to others what you would not want them to do to you". One underpinning of this doctrine is a principle of equality, in which all humanity is viewed as equal children of god.
 - 3) Deontological ethics or "duty ethics," illustrated primarily by Immanuel Kant, holds that ethics is a matter of duty to rational principles. This is described by Kant as a "categorical imperative": individuals should behave according to a set of universal rules. Philosopher John Rawls suggested a special thought experiment to discover Kantian principles. Suppose you are asked to design a society without knowing what role you will play in it—you might be a billionaire or a starving individual. Rawls argues that since you may turn out to be in the unfortunate position, you would design society in a way that maximizes the condition of the least well-off member.
 - 4) Utilitarianism, founded by Jeremy Bentham, says that society should maximize the "utility" of the people and adopt policies conducive to the greatest good for the greatest number. To Bentham, utility signifies a psychological state of well-being. He builds on the idea of "diminishing marginal utility of income," which holds that the added happiness of an extra \$100 of income is very high for a poor person, but very low for a rich person. As a result, income redistribution from the rich to the poor is seen as a way to maximize overall well-being in the society.
 - 5) Libertarianism holds that the greatest moral precept is liberty, and that the meaning of life is the freedom to choose one's own life course. In that view, the greatest harm occurs when the state takes away the liberties of individuals, and the best form of government is a

limited government that does little more than protect borders and provide for the rule of law.

- 6) The human rights philosophy holds that every human being on the planet has basic human rights that must be protected by the society. There are five basic categories of such rights: political, civil, economic, social, and cultural rights. This approach says that societies must organize themselves, perhaps through taxation and provision of public services, to secure individuals' rights to health, education and means of livelihood. The human rights approach is the dominant framework of the current international system of nations.
- The focus on meeting universal basic needs can be justified through the lens of human rights or through the lens of utilitarianism. We sometimes call basic needs "merit goods." Merit goods are those goods and services that should be accessible by all individuals in society irrespective of an individual's ability to pay. Health and education are both widely judged to be merit goods.
 - In 1948, the member states of the United Nations adopted the Universal Declaration of Human Rights (UDHR). The UDHR is the moral heart and soul of the United Nations; it is a call for a political and social order in which enumerated rights can be progressively realized.
 - In 1966, two covenants were adopted: the International Covenant on Civil and Political Rights (ICCPR) and the International Covenant on Economic, Social and Cultural Rights (ICESCR). The first focuses on the rights of citizenship and protection from abuses of the state such as torture, slavery, freedom of thought, etc. The second focuses on economic, social and cultural rights such as the right to work, to form unions, to social security, to "the highest attainable standard of physical and mental health," etc. Most governments subscribe to both covenants.
 - In 2000, the Millennium Development Goals (MDGs) were adopted by the United Nations. Taking their inspiration from the UDHR, the goal of the MDGs was to implement the human rights to meet basic needs.
 - Societies can have differences in income, wealth and job status far beyond anything that would naturally emerge from the normal range of differences between individuals and circumstances. Inequality is also a legacy of power, history, economy, and individual differences, amplified or diminished through the powers of the state.
 - The higher levels of inequalities of the Americas reflect the long legacy of societies created by European conquest. What emerged in the Americas after 1492, when Christopher Columbus set foot on the continent, was a small and dominant European group that ruled by force over both the indigenous and slave populations. The inequalities created in earlier centuries continue to cast a shadow through intergenerational dynamics of income, in which poverty in one generation leads to poverty in the next. Although slavery was eliminated throughout the Americas in the nineteenth century, many descendants of slaves still face massive liabilities of poverty, poor health, lack of rights and pervasive social discrimination and violence.
 - Indigenous populations historically have faced wanton discrimination. Many groups held land that was coveted by newcomers who lost no time in brutally forcing the indigenous groups to settle in marginal lands, often with very difficult environment. Today, the poverty rates of indigenous populations are very high around the world. We should note that the poverty rates among the indigenous populations are usually higher than the poverty rates among the non-indigenous population.

- Income inequality has risen markedly in many countries over the past twenty years. From the 1940s to the 1970s, the income share of the top 1 percent was around 10% of total household income, but it then turned up steeply. Today, the top 0.01 percent takes home around 5% of the total household income.
- There are at least three fundamental forces playing a role in the widening economic inequalities. The first force is the rising gap in earnings between high-skilled and low-skilled workers: the earnings premium to education has been rising and reflects the forces of globalization and technological changes. The second is the increased use of robotics and various information technologies, which shifts income from labor to capital, and the latter is generally concentrated among wealthy households. The third is the political system; for example, campaign contributors are able to get privileges in the form of tax breaks, subsidies, etc.
- Gender inequality has been a long-standing feature of most societies around the world. Men have been in the paid labor force while women have traditionally carried home-based work. Laws and social customs bolstered this division of labor, often making it impossible for women to own businesses. These inequalities are diminishing rapidly in many parts of the world.
- MDG 3 calls for gender equality and women's empowerment. Many social and economic benefits will be achieved as countries fulfill this goal, such as a labor force with more educated women, and the greater chances for children of these women to grow up healthier and succeed in school.
- The Gender Inequality Index (GII) combines several indicators on a weighted basis to offer a quantified assessment of gender inequality in each country. It includes three categories: reproductive health (maternal mortality rate and adolescent fertility rate), female empowerment (share of total parliamentary seats held by women, enrollment rate of women in higher education), and labor force participation of women. North Africa, the Middle East, and South Asia have especially low values of female labor force participation. South Asia and tropical Africa are the two regions with the lowest GII.
- Even in high-income countries, where female labor force participation rates have risen markedly in the past thirty years, there are still significant gaps between the earnings of men and women, and a glass ceiling still exists in many cases. Some of the remaining gender barriers are legal, others are cultural and a matter of tradition and inertia.
- Around the world, countless women face a terrible, unspoken burden of violence, whether it is from rape or domestic violence. It is necessary to bring public awareness to this kind of violence and press for better law enforcement and public leadership to quickly bring this fundamental denial of human rights to an end.

Concepts and Definition

Can you define or explain the significance of these concepts?

Virtue ethics	International Covenant on Civil and Political Rights (ICCPR)
Golden Rule	International Covenant on Economic, Social and Cultural Rights (ICESCR)
Duty ethics	Income inequality
Utilitarianism	Gender inequality
Diminishing marginal utility of income	Gender Inequality Index (GII)
Libertarianism	
Human rights	
Merit goods	

Check your facts

- 1) The idea of virtuous living being key to social stability was _____'s idea.
- 2) What types of rights does the human rights philosophy insist every human has?
- 3) In what year was the UDHR adopted?
- 4) In what year were the ICCPR and ICESCR adopted?
- 5) Does Africa have a relatively high or relatively low ethno-linguistic fractionalization?
- 6) In 1973, a college graduate had a 30 percent premium relative to a holder of a high school diploma. Approximately how much is this premium at present?
- 7) In the 1970s, the CEO compensation was roughly twenty times that of average workers. Approximately how many times higher has it been in the past decade?
- 8) How much of total U.S. income do the 12,000 richest households hold? (There are about 120 million households in the United States).
- 9) Which regions have especially high gender inequality?
- 10) True or False: At the primary education level, the enrollment gap between boys and girls is nearly closed.

Answers: 1) Confucius; 2) Political, Civil, Economic, Social, Cultural; 3) 1948; 4) 1966; 5) Relatively High; 6) 45%; 7) between 200 to 350 times that of average workers; 8) 5%; 9) Tropical Africa and South Asia; 10) True;

Review questions

- What are six important approaches to social inclusion or ethics of wealth?
 Who best exemplify the approach of virtue ethics?
 Who best exemplify the approach of duty ethics?
 What is meant by the "categorical imperative"?
 Who was Jeremy Bentham and what is he best known for?
 How is the human rights philosophy related to the current international system of nations?

Why are education and health considered merit goods?
How has history contributed to inequalities in North America?
How are indigenous populations often discriminated against?
How can the law at times be used to force inequalities?
How have inequalities evolved in the past two decades?
What are three forces of widening inequalities at present?
What are possible policies to reestablish social mobility and social inclusion?
How is ethnolinguistic fractionalization related to inequalities?
How is the Gender Inequality Index calculated?
How do social or cultural norms prevent the advancement of gender equality?
What are some examples of legal barriers to gender equality?
What are possible policies to close the remaining gender gap in both high and low-income countries?

DATA ACTIVITIES

EASY

A. **Human Rights**

Explore the Universal Declaration of Human Rights (UDHR) website (<http://www.un.org/en/documents/udhr/hr law.shtml>).

- 1) How many of the United Nations member states have ratified at least one of the nine core international human rights treaties?
- 2) How many of the United Nations member states have ratified four or more of the nine core international human rights treaties?
Go to the Human Nations Human Rights indicator page: <http://indicators.ohchr.org/>. You can access more information by clicking on a specific country on the map.
- 3) How many treaties have the United States ratified?
- 4) When did the United States sign the Convention on the Elimination of All Forms of Discrimination against Women?
- 5) Have the United States ratified the Convention on the Elimination of All Forms of Discrimination against Women?
- 6) List the two countries with the smallest number of ratified treaties.
- 7) Has China ratified the International Covenant on Civil and Political Rights?

Answers: 1) All; 2) 80%; 3) 9; 4) 1980; 5) No; 6) Singapore, Brunei; 7) No

EASY

B. **Age at first marriage**

Take a look at the UN report on the "State of the World's Indigenous Peoples", published in 2009 and available here:

http://www.un.org/esa/socdev/unpfii/documents/SOWIP/en/SOWIP_web.pdf

Page 132 displays a table about the disparity in years of schooling among indigenous and non-indigenous populations.

- 1) In Peru, how many years of schooling do indigenous populations have on average?
- 2) In Peru, how many years of schooling do non-indigenous populations have on average?
- 3) In the table, which country has the largest gap in years of schooling between indigenous and non-indigenous populations?

EASY

C. Age at first marriage

Go to Gapminder (www.gapminder.com) and plot the age at first marriage for women against income per capita.

- 1) In 2005, what was the average age at first marriage in Sweden, China and Niger?
- 2) Consider the countries with income per capita above \$20,000 in 2005. Which country had the lowest age at first marriage?
- 3) In 2005, which countries from North Africa had an age at first marriage higher than the average trend?
- 4) In 2005, what were the top 3 African countries with highest age at first marriage?
- 5) Approximately, in what year did almost all Western European countries rise above an age at first marriage of 26?

Answers: 1) 32, 23, 18; 2) Oman and Puerto Rico; 3) Tunisia, Algeria and Morocco; 4) South Africa, Namibia and Botswana; 5) around 1995

MEDIUM

D. Gender Inequality Index

Download data for the Gender Inequality Index (GII), the Human Development Index (HDI), and the GDP per capita from the Human Development Report (<http://hdr.undp.org/en/data>).

- 1) Plot a cross-section of GII level in 2013 on the y-axis and GDP per capita in 2012 on the x-axis. Add a trend line.
- 2) Describe and comment the graph. Is there a trend? Are there any outliers?
- 3) Plot a cross-section of GII level in 2013 on the y-axis and HDI ranking in 2013 on the x-axis.
- 4) Describe and comment the graph. Is there a trend? Are there any outliers?
- 5) Using the table available on <http://hdr.undp.org/en/content/table-4-gender-inequality-index>, discuss some of the factors that might explain why some countries have very different rankings in terms of income per capita, HDI and GII.

HARD

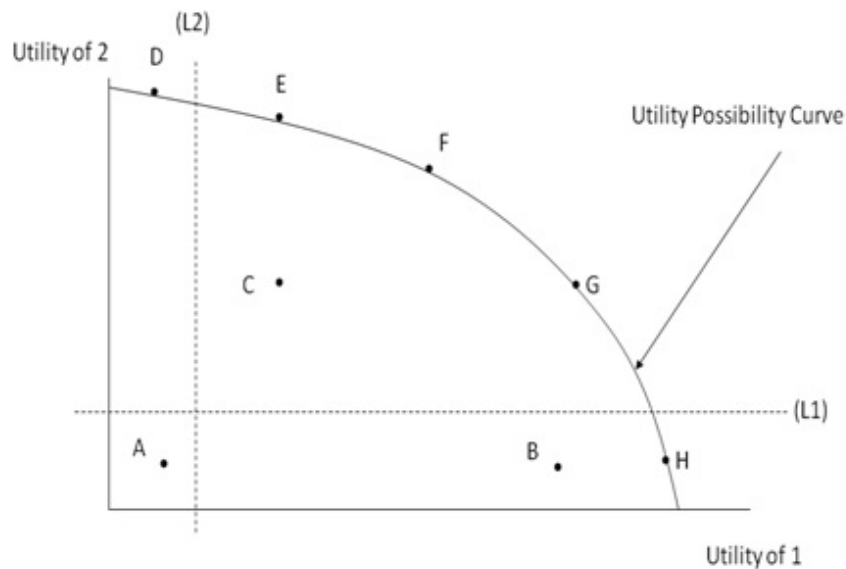
E. Case study analysis

Select a policy, program or project tackling inequalities and discriminations that has been or is currently being implemented. Write a paper (about 15 pages) to analyze the project. You will first briefly introduce the project. Then evaluate the strengths and weaknesses of the program, and conclude with lessons for the future.

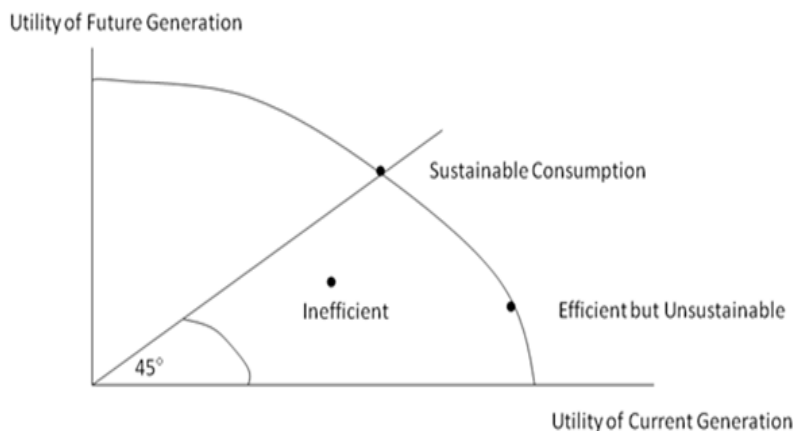
DISCUSS AND DEBATE

- 1) Discuss the various factors that have led to a widening of economic inequalities in the past decades. Debate what can be done about it.
- 2) Using the case study below entitled "How land rights can empower women". Discuss the various ways laws can discriminate against gender, racial or ethnic groups.

- 3) Using the case study below entitled "Sweden—Encouraging an involved fatherhood", discuss the types of policies needed to close the remaining gender gap.
- 4) Suppose we live in a society with 2 individuals. The graph below represents some possible utility allocations among the 2 individuals. We will consider the following approaches: libertarianism, human rights and utilitarianism. We will also consider a fourth approach called Pareto-efficiency. An allocation of resources is said to be Pareto-efficient when it is impossible to make somebody better off without making somebody else worse off. In other words, an allocation of resources is Pareto-efficient when the only way to make some individuals better off is take away from some other individuals. For each of the different approaches,
- Discuss which allocations are considered "admissible".
 - Suppose we start at point C; discuss whether we should try to get to another point to achieve a better allocation of resources, and if so which one(s).



- 5) Using the graph below, discuss how market efficiency and sustainability are related.



CASE STUDY

How land rights can empower women

In the Gaya district of Bihar, India, a local temple-monastery complex held land in violation of land ceiling laws. In the late 1970s women and men of landless households jointly agitated for ownership rights on the land they had cultivated for decades. In 1981 the government redistributed about 1,000 acres of the land to the farmers. Women demanded independent land rights and, in two villages, they received them. In the villages where men alone received titles, women's insecurity grew, as did the frequency with which men threatened their wives with eviction in situations of domestic conflict. In the villages where women were given titles of their own, the women had greater bargaining power.

Source: *Taking Action: Achieving Gender Equality and Empowering Women*, UN Millennium Project Task Force on Gender Equality. Box 6.1. <http://www.unmillenniumproject.org/documents/Gender-complete.pdf>

CASE STUDY

Sweden—Encouraging an involved fatherhood

When Olof Palme, the Swedish prime minister, made a speech in 1970 for a women's organization in the United States, he surprised the audience by not speaking about women but about men. The title of his lecture was "The Emancipation of Man," and Palme argued that only if both women and men share a dual role—at home and at work—can any substantial change take place. That is, men should be given the same rights and duties as women in their parental capacity. The transformation of maternity leave into parental leave encourages Swedish men to take an active part in parenthood. This change took place in 1974 and meant that the leave following the birth of a child was no longer reserved for the mother but could also be used by the father. Over time, parental leave was extended from 6 months in 1974 to 16 months today. The share of fathers taking parental leave grew slowly and in small numbers. Some argued that there should be an obligatory division of the entitlement between parents. A heated debate on parental "freedom to choose" ensued. Since then, numerous governmental and nongovernmental campaigns have encouraged fathers to use parental leave. In 1995, a one-month "daddy quota" was adopted to encourage fathers to take parental leave and stimulate gender equality; that is, one month of the parental leave could no longer be transferred to the other parent. In 2002, the "daddy quota" was increased by another month. Of the claimants to parental leave in 2007, fathers accounted for 44 percent. Around 49 percent of fathers of children born in 1993, before the introduction of the father's months, did not use a single day of the parental leave allowance. Two years later, only 19 percent of fathers did not take parental leave; while the proportion that took 30 days or more increased from 33 percent to 53 percent. There is still a way to go, though. In 2007, a mere 5 percent of fathers and mothers shared their parental allowance days equally (40–60 percent). In July 2008, a gender equality bonus was introduced as an incentive to share the parental allowance more equally. The parent with the lower income (usually the mother) receives a tax deduction of at most €300 for going back to work full-time while the other parent (usually the father) takes parental leave.

Source: World Bank. (2012). *World development report: gender equality and development*. BOX 8.15. <http://siteresources.worldbank.org/INTWDR2012/Resources/7778105-1299699968583/7786210-1315936222006/Complete-Report.pdf>

FURTHER READING

- **Social Inclusion**

This report highlights the limits of the existing development and rights agendas and suggests steps needed to ensure an agenda that moves beyond poverty reduction to focus on social inclusion as an overarching aim.

Sustainable Development Solutions Network Thematic Group on Challenges of Social Inclusion. 2013. *Achieving Gender Equality, Social Inclusion, and Human Rights for All: Challenges and Priorities for the Sustainable Development Agenda*. New York: Sustainable Development Solutions Network.

This document describes trends which are likely to impact gender equality, social inclusion and human rights and discusses pathways towards sustainable development.

Background paper for the High-Level Panel of Eminent Persons on the Post-2015 Development Agenda: Social Inclusion & Human Rights, Implications for 2030 and Beyond (6 pages) <http://unsdsn.org/wp-content/uploads/2014/02/130114-Social-Exclusion-and-Human-Rights-Paper-for-HLP.pdf>

- **Gender equality**

This reports identifies the interventions and policy measures needed to achieve the Millennium Development Goals related to gender.

UN Millennium Project Task Force on Gender Equality. (2005). *Taking Action: Achieving Gender Equality and Empowering Women, Executive Summary* (26 pages) <http://www.unmillenniumproject.org/documents/Gender-frontmatter.pdf>

This report shows the patterns of progress and persistence in gender equality and points to priority areas for policy going forward.

World Bank. (2012). *World development report: gender equality and development*.

- **Indigenous people**

This UN report discusses many issues affecting indigenous peoples including major environmental issues, education, health and human rights.

United Nations Department of Economic and Social Affairs. 2009. *State of the World's Indigenous Peoples*. http://www.un.org/esa/socdev/unpfii/documents/SOWIP/en/SOWIP_web.pdf

- **UN declarations**

United Nations General Assembly, 3rd Session. 1948. "Universal Declaration of Human Rights." (217 A (III)). New York: United Nations.

United Nations General Assembly, 21st Session. 1966a. "International Covenant on Civil and Political Rights" (A/RES/21/2200). New York: United Nations.

United Nations General Assembly, 21st Session. 1966b. "International Covenant on Economic, Social and Cultural Rights" (A/RES/21/2200). New York: United Nations.

United Nations General Assembly, 55th Session. 2000. "United Nations Millennium Declaration" (A/RES/55/2). New York: United Nations.