



The Politics of Social Inclusion: Bridging Knowledge and Policies Towards Social Change

Edited by
Gabriele Koehler, Alberto D Cimadamore,
Fadia Kiwan, Pedro Manuel Monreal Gonzalez

Gabriele Koehler, Alberto D. Cimadamore, Fadia Kiwan,
Pedro Manuel Monreal Gonzalez (Eds.)

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Towards Social Change**

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For more information contact:

GRIP Secretariat
Faculty of Social Sciences
University of Bergen
PO Box 7802
5020 Bergen, Norway.

E-mail: gripinequality@uib.no

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Acronyms and abbreviations

ACHR	Asian Coalition for Housing Rights
ADB	Asian Development Bank
APVVU	Andhra Pradesh Vyvasaya Vruthidarula Union
BJP	Bhartiya Janata Party
BNA	Basic Needs Approach
BSP	Bahujan Samaj Party
CBO	community-based organizations
CEDAW	International Convention on the Eradication of all forms of Discrimination against Women
CEE	Centre for the Economics of Education
CERD	International Convention on the Elimination of All Forms of Racial Discrimination
CPRC	Chronic Poverty Research Centre
CRPD	International Convention on the Rights of Persons with Disabilities
CROP	Comparative Research Programme on Poverty
CSEI	Centre for Social Equity and Inclusion
DDA	Delhi Development Authority
DFID	(UK) Department for International Development
FAO	Food and Agriculture Organization of the United Nations
GPI	gender parity index
HDA	human development approach
HDI	Human Development Index
IAY	Indira Awas Yojna
IDS	Institute of Development Studies
IIEP	UNESCO International Institute for Educational Planning
IILS	International Institute for Labour Studies
ILGI	informal local governance institution
ILO	International Labour Organization
IOM	International Organization for Migration
ISC	could be a mistake
ISSC	International Social Science Council
JNNURM	Jawaharlal Nehru National Urban Renewal Mission
KCC	Kampala City Council
KCCA	Kampala Capital City Authority
MDG	Millennium Development Goal
MGNREGA	Mahatma Gandhi National Rural Employment Guarantee Act
MHUPA	Ministry of Housing and Urban Poverty Alleviation (India)
MOST	Management of Social Transformations
NBER	(US) National Bureau of Economic Research
NCDHR	National Campaign on Dalit Human Rights
NGO	non-governmental organization
NPEP	National Poverty Eradication Programme
NSDFU	National Slum Dwellers Federation of Uganda

Acronyms and abbreviations

OBC	other backward castes
OHCHR	Office of the High Commissioner for Human Rights
OPP	Orangi Pilot Project
PATH	Programme of Advancement through Health and Education
PCI	Planning Commission of India
RAY	Rajiv Awas Yojana
SC	Scheduled Castes
SDG	Sustainable Development Goal
SDI	Slum/Shack Dwellers International
SES	socio-economic status
SIDS	Small Island Developing States
SP	Samajwadi Party
SRS	Slum Redevelopment Scheme
ST	Scheduled Tribes
UDHR	Universal Declaration of Human Rights
UiB	University of Bergen
UNDESA	UN Department of Economic and Social Affairs
UNDP	UN Development Programme
UNDRIP	UN Declaration on the Rights of Indigenous Peoples
UNICEF	UN Children's Fund
UNRISD	UN Research Institute for Social Development
UPA	United Progressive Alliance
WHO	World Health Organization

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This book has its origin in an international workshop organized by the Comparative Research Programme on Poverty (CROP) of the International Social Science Council (now the International Science Council (ISC)) and the University of Bergen (UiB), and UNESCO's Management of Social Transformations Programme (MOST), held at the UNESCO Headquarters in Paris on 6–7 July 2017.

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Part I
Conceptual understandings of social inclusion

CHAPTER 1

THE POLITICS OF SOCIAL INCLUSION: INTRODUCTION

*Gabriele Koehler, Alberto D. Cimadamore, Fadia Kiwan and
Pedro Monreal Gonzalez*

A. The rationale for a volume on the politics of inclusion

Academics, policy-makers, civil society and concerned citizens across the planet are alarmed by the persistence of global poverty, the intensity of social exclusion and increasing inequalities. Multidimensional poverty continues to affect half of humanity. Inequality has reached unprecedented levels: according to Oxfam's analysis, for example, in 2018, 26 people owned the same wealth as the 3.8 billion people who make up the poorest half of humanity (Oxfam, 2019; also see Piketty, 2014; UNRISD, 2018). Climate change impact and armed conflicts are wiping out many human development achievements of the past decades, frequently exacerbating existing patterns of social exclusion.

To redress the dystopian situation, the international community adopted the 2030 Agenda for Sustainable Development – Transforming our World (United Nations, 2015), the Paris Agreement on Climate Change (UNFCCC, 2015), and designed a new urban agenda (UN Habitat, 2016). All of these have in common a commitment to norms and principles of social inclusion – promising to ‘end poverty and hunger in all their forms and dimensions’ and to ‘leave no one behind’. Leaving no one behind has been understood in a universalist and rights-based interpretation as including all people on the planet in sustainable and just societies. That would indeed be transformative of the dominant socio-economic orders, which have been reproducing and cementing poverty, inequality and social exclusion throughout history.

The status quo to be transformed is maintained by power relations which need to be addressed in order to produce sustainable economic, social, ecological and political inclusion for all. However, the structural transformations that would be required to unseat the dynamics of poverty, inequalities and exclusion are far less addressed, and do not feature expressly in the normative texts. Besides, the concept of inclusion is not defined, and therefore it is not possible to measure or evaluate progress toward the achievement of this goal,

which is central to the general ambition to 'leave no one behind'. In short, power relations tend to be ignored or overlooked in domestic and multilateral policy debates (UNRISD, 2016), and the absence of a clear understanding of what social inclusion means articulates the problematic on which this book intends to focus.

This volume was therefore conceived to address the power relations that both sustain and transform social orders marked by social exclusion, and to advance the understanding of the *politics* of social inclusion.

The collective construction of this understanding began with an international workshop held at UNESCO Headquarters, followed up in collaborative work between the editors and authors. This introductory chapter intends to synthesize and reflect on this process of collaborative knowledge production while advancing useful knowledge on the politics of inclusion. In order to do that, we first track social inclusion deliberations from two critical vantage points – first, that of academic discussions which generally analyze the phenomenon of social exclusion, and second, from the discussion of social inclusion as it has informed debates and agenda-setting at the United Nations and related multilateral bodies, and at the European Commission. We then provide an overview of the two sections of the volume and their chapters. In closing, we sketch out a possible way forward regarding the research and policy nexus, trying to avoid jargon and unnecessary complexities to reach beyond the academic community.

B. Defining and understanding exclusion, inclusion and their political dimensions

Social inclusion presupposes in our view the realization of human rights, as laid out in the Universal Declaration of Human Rights (UDHR), and the UN Covenants on Economic, Social and Cultural Rights, and Political and Civil Rights. This general understanding needs of course to be contextualized within national and subnational legal orders that articulate states and societies around notions of justice which are not normally realized. The high levels of poverty and inequality are indicative of the structural violation of human, social, economic and cultural rights observed in many societies. In this view, social exclusion implies the denial to members of society of their basic human, political, social and economic rights guaranteed in international, national and subnational constitutions and legal

orders. Rights are not realized for many reasons, principally because the excluded and the poor have limited or no access to the institutions of justice, and therefore are usually powerless in systems structurally biased against them. In this general context, the politics of inclusion refers to the power relations evolving within historical forms of states and international relations where asymmetrical economic, social and political orders tend to exclude large segments of the population (Cimadamore, 2008; UNRISD, 2018).

As we can see below and throughout the volume, this view is not necessarily shared by those who tend to focus narrowly on notions of inclusion as merely concerning inclusion in labour markets or social protection measures. The transformational challenge is complex in itself. It is even more so when we depart from a situation where there is no clear consensus on what inclusion is, how it is measured, what the targets are, and the means and policies to reach them. This volume can only deal with some aspects of the enormous analytical and policy puzzle that needs to be solved – at the latest – by 2030 if we wish to remain true to the commitments of the UN Agenda for Sustainable Development (United Nations, 2015) and other multilateral normative frameworks. Nevertheless, the book might at least selectively contribute with a number of insights to stimulate debates and research agendas aimed at addressing the problematic of social inclusion in the era of the Sustainable Development Goals (SDGs). In order to situate these insights in a broader discourse, there is a need to scan some relevant understandings of exclusion and inclusion (Delamonica, Chapter 2), and their interface and overlappings with poverty (see Spicker, Chapter 3). We therefore begin by sketching the evolution of these and other related concepts. This may serve to assess the pool of policies for social inclusion derived from different schools of thought and political ideologies, so as to contribute to an analysis of the *politics* of social inclusion.

Social exclusion/inclusion in the academic literature

The concept of social exclusion has analytical and political implications. Analytically, it can be traced to various strands in social and political literature focusing mainly on the causes and consequences of the systematic marginalization of individuals and communities from decent work, socio-economic security and equitable access to public services.

As suggested before, socially, economically and politically, processes of exclusion undermine social justice in societies where

constitutional rights and obligations set the parameters of the relationships among all components of the state. In this sense, policies of social inclusion aim to redress and overcome those unbalances and asymmetries produced by the lack of realization of those basic human, social, economic and cultural rights that constitute the pillars of state and societal orders.

However, in mainstream discussions the concept of exclusion is often attributed to and refers to the work of the French social worker René Lenoir. His treatise on the excluded from the 1970s does not define the term social exclusion, but instead is an empirical enquiry into the situation of people challenged by difficult economic, social or health circumstances in the 1960s and early 1970s in France (Lenoir, 1974). Such focus on discussions in 1970s Europe somehow ignores or minimizes the fact that the social sciences have at least since the nineteenth century had a customary concern with issues of social exclusion, originally identified as 'marginalization', and that processes of social exclusion have been a major analytical theme in the global South for many decades.

For instance, Karl Marx's 'reserve army' provides the centrepiece of an explanation that situates marginalization as a structural phenomenon endemic to capitalism and the related processes of exclusion and poverty. Conversely, neoclassical economics used the term 'residuum' (Marshall, 1925) in a different political vein, ascribing exclusion to personal character flaws or cultural resistance, such as 'poor physique and feeble will, with no enterprise, no courage, no hope and scarcely any self-respect, whom misery drives to work for lower wages than the same work gets in the country' (Marshall, 1925, pp. 142–51).

Social sciences in Latin America and the Caribbean during the 1960s and 1970s focused on marginality (*marginalidad*) in the context of the modernization process. This referred to those segments of the population that were sidelined from the dynamics of modernization that took place in the region in the first half of the twentieth century. The main analytical (and political) proposition was that this part of the population needed to be integrated into the process of modernization, since marginality indicated a transitory phenomenon located between traditional societies and modern societies (Pérez Sáinz, 2012; Nun, 1969).

Authors like Janice Perlman conducted a thorough analysis of the different approaches to marginality in the context of the theory of modernization, and developed a critical assessment. Her main

argument was that the approach of marginality was based in a model of equilibrium of social integration in which relations among all social actors were seen as mutually beneficial. Her critique can be summarized as the idea that:

it is perfectly possible to have a stable system biased towards the benefit of some actors precisely because there is exploitation, explicit or implicit, of other actors. The exploited groups are not marginalized. On the contrary, they are integrated into the system, operating as a vital component of the system. That is, integration does not necessarily imply reciprocity.

(Perlman, 1976; and also see Pérez Sáinz, 2012)

Nor does integration necessarily imply progress towards a more just social inclusion. In a similar vein, it is argued that the operation of basic markets (labour, capital, credit, land, knowledge) necessitates the disempowerment of certain social groups, and when the access to social citizenship is not guaranteed, primary exclusion turns into social exclusion (Mora Salas, 2004; Pérez Sáinz and Mora Salas, 2006).

This assessment tallies with approaches from/about Asia that build on the notion of participatory exclusion (Agarwal, 2001) or adverse incorporation (Hickey and Du Toit 2007) – forms of inclusion that are detrimental to the community concerned.

Concerning Asia, the literature looks at social exclusion generically and analytically. Amartya Sen, for example, was one of the first to raise the issue for the region: his work on gender-based exclusion – resulting in millions of ‘missing women’ in South Asia – was seminal (Sen, 1990). Sen noted a ‘specific type of social exclusion that – particularly from basic education and elementary social opportunities – plagues the economies of West and South Asia’ (Sen, 2000, p. 31). His work on identity-based exclusions and the need to strengthen capabilities informed an entire literature, both academic research and empirical studies, including surveys commissioned and conducted for or by civil society, human rights bodies and development agencies.¹ Power is constituent in social exclusion, and many of the Asian theoreticians have formulated this in various ways. Amartya Sen understands social exclusion as a relational issue, in terms of how individuals relate to each other; this is constituent for his conceptualization of the issue (Sen, 2000). For Arundhati Roy (2014), social exclusion is embedded in political structures and contestations. At the empirical level, the relationality – in the sense of political oppression – becomes manifest

1 The Asian Development Bank (ADB), for example, picked up the social exclusion concept after the Asian financial crisis of 1997/98.

in the field work presented in this volume, and in the global survey done elsewhere by Deborah Rogers and Balint Balázs (2016).

Horizontal exclusion and the exclusion–poverty nexus

A related strand of social exclusion discourse is that of the different vectors or processes of social exclusion, and their interface, sometimes described as intersecting inequalities (Kabeer, 2010) or intersecting forms of discrimination and clustered deprivations (Bennett, 2006; Razavi and Hassim, 2007; Razavi, 2016; UN Women, 2018). Clustered deprivations, for example, refer to the process whereby ‘deprivations ... co-produce and “cluster” together, so that deprivation in one area is accompanied by deprivation in another’ (UN Women, 2018, p. 139). Poverty, understood as a lack of access to resources, tends to be ‘strongly correlated with many other forms of deprivation, including ... education, health and well-being’ (UN Women, 2018 p. 139). Similarly, inequality is experienced not only among individuals but among groups defined by class, gender, ethnic condition and territory, among other factors (Pérez Sáinz and Mora Salas, 2009). The operation of ‘basic markets’ is determined not only by power dynamics of class but also by those other factors, resulting in diverse possibilities of unequal distribution of the surplus, which could be different by country and period.

Most analysts agree that gender-based exclusion is overarching. It takes the form of political and social oppression, discrimination and economic marginalization of women and sexual minorities. It is frequently expressed in outright violence against women. It affects all income and sociocultural groups: women in all societies, classes, and ethnic and faith communities are at a structural and deeply embedded disadvantage. It exacerbates the other vectors of exclusion and marginalization, and is cross-cutting and hence definitive. However, women are not a minority, so the processes and dynamics of exclusion are different from those affecting other identity groups.

Gender-based exclusion is often exacerbated by ethnicity-based and racist forms of exclusion, including caste systems. All are based on entrenched hierarchies and asymmetrical power relations (Kabeer, 2010; Rogers and Balázs, 2016; World Bank, 2013). Vectors and outcomes of exclusion can also be categorized by other forms of identity. These comprise economic factors such as socio-economic and employment status, and coverage by social protection/social security systems; sociocultural factors, such as gender and sexual orientation, age, health status, including physical and mental

challenges, or educational status, language and ethnicity, faith, and a person's cultural identity; geophysical factors such as shelter quality, urban or rural location, topography and accessibility of one's home; and political factors such as citizenship status, migrant or refugee status, and access to the justice system. Silver (1995), Levitas (2006) and Delamonica (see Chapter 2) among others have developed or discussed similarly comprehensive lists.

One concern of this volume is the relationships and the intersections between poverty and the many vectors of social exclusion. The notion of poverty has been researched for quite some time, primarily in the form of income poverty, and not necessarily correlated to social exclusion (see Spicker, Chapter 3, for a comprehensive overview). One early analysis of the systemic connection between poverty and exclusion, using a different terminology, was provided by Galtung (1969): social structures oppress individuals and communities by ethnicity, gender, age, income, class and other factors. Seemingly hidden structural violence is a cemented feature across all societies, leading to income poverty. Many countries and communities in addition suffer from open, manifest violence as the most extreme form of social exclusion. In the same vein, Paul Spicker (in Chapter 3) emphasizes the political and relational dimensions of exclusion and poverty.

The concept of multidimensional poverty has been introduced as a criterion in the targets of the 2030 Agenda and its SDG goals (goal 1.2). Progress in conceptualizing and measuring poverty in a multidimensional way (using the Human Development Index (HDI), the Multidimensional Poverty Index (MPI) and so on) (Alkire et al., 2015) has been quite significant. At the same time, the study of causes and consequences of absolute and relative poverty in different historical contexts has become more differentiated, making structural, socio-economic, political and institutional aspects more visible. Ethical and legal approaches to poverty production and eradication not only add to the notion of relative deprivation but also subsume the normative approach based on the principle of citizenship implied in the exclusion/inclusion conceptualization.

In sum, there is now an agreement in academic discourse that social exclusion is related to the genesis and the re-production of poverty and is an expression of power relations; that a relational, power-aware concept is needed to understand multidimensional poverty; and that a wide set of 'inclusion policies' is required if we genuinely want to achieve poverty eradication, and this in all relevant dimensions, not just income poverty. However, with respect

to inclusion policy approaches, the academic literature limits itself to rather general and generic recommendations, mainly (but not exclusively) because of the lack of agreement on its definition and indicators. This volume is therefore also an attempt to offer some policy options.

The main strands of the conceptual problematic in UN discourse

Parallel to academic research, a number of UN and UN-related bodies have also contributed to the discourse on social inclusion and exclusion. At UNESCO (2012), issues directly relevant to ‘social inclusion’ were prominent in the MOST (Management of Social Transformations) Programme even before the concept was formally incorporated into the terminology of UNESCO and the UN system. Over the past twenty years, UNESCO contributed to the production of knowledge relevant to social inclusion, and integrated the concept into programmatic work, notably in the sector of education, including an Intersectoral Programme on Poverty Eradication which situated poverty as a human rights issue. Following this tradition, the MOST Programme aims to serve as a bridge from evidence-based knowledge from social sciences research to decision-making in public policy. Its purpose is to enhance the capacities of governments to manage multidimensional crises, to restore and consolidate stability, and to achieve justice and peace. This was in fact the general frame of reference for the 2017 International workshop organized by the Comparative Research Programme on Poverty – CROP (ISSC/UiB) and MOST (held at UNESCO Headquarters in Paris on 6–7 July 2017) – which was the origin of this volume. By selecting ‘politics of social inclusion’ as a metatopic and partnering with CROP as a scientific international network, the MOST intergovernmental body intends to produce and disseminate more comprehensive knowledge about exclusion and inclusion, as well as to make an impact in the policy debate oriented to ‘leave no one behind’.

Previous efforts to advance on the conceptual clarification of social exclusion and inclusion as well as their complex interrelationships with poverty reached one of its peaks in the 1995 with the publication of the seminal study by the International Labour Organization (ILO) International Institute for Labour Studies (IILS) (Rodgers et al., 1995). It was a milestone since it aimed to ‘deconstruct’ the usage of the term in European policy debates and to ‘fashion a notion of social exclusion which is not Eurocentric but relevant globally, in a wide variety of

country-settings'. It was a reaction to the policy debates that took place in Western Europe on the 'emerging patterns of social disadvantage, particularly associated with long-term unemployment'. Within this framework, the ILO volume highlights that social exclusion refers to marginalization from society through economic deprivation and social isolation, as well as fragmentation of social relations and breakdown of social cohesion (Gore and Figueiredo, 1997). That study also aimed 'to clarify the interrelationships between poverty and social exclusion and to assess the potential usefulness of this latter approach for anti-poverty strategies' (Gore and Figueiredo, 1997, p. 3).

The context in which the debate emerges is a relevant background to assess its political and analytical strengths. The increasing relevance of employment/unemployment in European political debates, along with the political inconvenience that poverty implies for politicians and other decision-makers who cannot properly deal with it, contributed to promoting the use of exclusion/inclusion as a 'euphemism'. Certainly, the research on poverty was relatively more advanced at that time, and there were ways to not only define it but also measure it with more precision. However, perhaps the intention was to produce or develop not an analytical concept but a political one. In this regard, Else Øyen (1997) concluded in a chapter of a study for ILS that social exclusion and social inclusion are political rather than analytical concepts. In her view, politicians found the concept of poverty 'too loaded' so they moved towards the concepts of social exclusion/inclusion.

Other UN and UN-related sites of social inclusion/exclusion discourse include the UN Research Institute for Social Development (UNRISD), the UN Department of Economic and Social Affairs (UNDESA), and the World Bank. UNRISD has been seminal with respect to examining gender-based exclusions (e.g. UNRISD, 2005, 2016). The UNDESA Expert Group on 'Creating an Inclusive Society' was decisive for the emergence and further refinement of the concept of social inclusion, in particular for the intensification of its use within the UN system and beyond.² The World Bank has commissioned much country-level research on social exclusion/inclusion over the past decade, and published a comprehensive global study on social inclusion. Analytically, that study defines 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

2 UNDESA organized three Expert Group meetings between 2007 and 2009 in Paris, Helsinki and Accra.

society' (World Bank, 2013, p. 4). With respect to policy-making, it defines social inclusion 'as the process of improving the terms for individuals and groups to take part in society' (World Bank, 2013, p. 3). It discusses the roles of both intersecting identities and power, and offers a compendium of policy responses, arguing the case for cross-cutting approaches across policy domains (World Bank, 2013, pp. 229 ff), which tallies with the findings of many of the chapters in this volume that policies for inclusion need to be multilayered and multipronged. ILO and the International Organization for Migration (IOM) have also produced country-level and regional studies on social exclusion processes and their impact on poverty (e.g. ILO, 2005).

Social inclusion in UN development agendas

In the context of formulating UN development agendas, the concepts of social inclusion and social integration have been intertwined or used interchangeably. Social integration, paired with the concept of social exclusion, first appeared in the UN Copenhagen Summit on Social Development in 1995 (United Nations 1995). UNESCO and ILO had played significant roles in the intellectual debates leading up to the Summit.

The Social Summit emphasized the concept of an 'inclusive society', defined as a society 'in which every individual, each with rights and responsibilities, has an active role to play'. The policy-related concept was that of 'social integration', defined in the documents of the Summit as:

with full respect for the dignity of each individual, the common good, pluralism and diversity, non-violence and solidarity, as well as their ability to participate in social, cultural, economic and political life, encompasses all aspects of social development and all policies. It requires the protection of the weak, as well as the right to differ, to create and to innovate. It calls for a sound economic environment, as well as for cultures based on freedom and responsibility. It also calls for the full involvement of both the State and civil society.

(United Nations, 1995, Point 2 of the Programme of Action)

It does not, however, call into question the imbalances in power between states, civil society, communities and individuals.

The analytical preference for the concept of social inclusion seems to be based on tactical considerations: 'Social inclusion is also often more easily accepted as a policy goal, as it clearly eliminates

a connotation of assimilation that some associate with the term “integration” – not all individuals and/or groups in societies are eager to be “integrated” into mainstream society, but all strive to be included’ (UNDESA, 2009). For example, in the Millennium Development Goals (MDG) Roadmap (United Nations, 2001), the policy-related concept of integration was used only in the – important but rather narrow – context of reintegrating ex-combatants into their communities.

Curiously, the concept of social inclusion and policy proposals of social integration did not feature in the first two of the United Nations’ two poverty eradication decades, which were the direct political follow-up to the Copenhagen Summit, nor did they play a role in the Millennium Declaration (United Nations, 2000). However, in the formal call for the International Day for the Eradication of Poverty 2018, UNDESA states that ‘Government policies alone cannot create the social inclusion that is fundamental to reaching those left furthest behind and overcoming poverty in all its dimensions.’³

In global intergovernmental UN debates, social inclusion resurfaced as a key concept in the UN 2030 Agenda for Sustainable Development and its SDGs (United Nations, 2015). ‘Sustainable development recognizes that eradicating poverty in all its forms and dimensions, combating inequality within and among countries, preserving the planet, creating sustained, inclusive and sustainable economic growth and fostering social inclusion are linked to each other and are interdependent’ (United Nations, 2015, article 13). The aspiration of social inclusion is present in many of the goals, such as the – perhaps central – goal of addressing inequality within and among countries (Goal 10) and the goal on empowering women and achieving gender equality (Goal 5). Inclusiveness is a driving notion with regard to making cities and human settlements inclusive, safe, resilient and sustainable (Goal 11), and with regard to promoting peaceful and inclusive societies for sustainable development, providing access to justice for all, and building effective, accountable and inclusive institutions at all levels (Goal 16). More visibly, it is intrinsically link to the motto of ‘leaving no one behind’.

3 www.un.org/development/desa/socialperspectiveondevelopment/international-day-for-the-eradication-of-poverty-homepage/2018-2.html. ‘Social inclusion’ was missing in previous DESA documents on the Third Decade, for instance, the ‘Message on the occasion of the Inter-Agency Expert Group Meeting in support of the Implementation of the Third United Nations Decade for the Eradication of Poverty (2018–2027)’, 18 April 2018, did not mention social inclusion or social exclusion: www.un.org/development/desa/statements/mr-liu/2018/04/iaeg-on-eradication-of-poverty.html

Inclusiveness informs many of the goals, even when social inclusion is not the concept used. Thus, there is a call to ensure universal access to sexual and reproductive health-care services (target 3.7), to universal health coverage (3.8), and the commitment to inclusive and equitable quality education and promoting lifelong learning opportunities for all (Goal 4). Goals and targets concerning water and sanitation (Goal 6) and access to affordable, reliable, sustainable and modern energy for all (Goal 7) speak of access ‘for all’.⁴ Many of the indicators recommended to Member States to measure progress (United Nations, 2017) are to be disaggregated by factors such as gender, age, location (rural/urban), indigeneity, and living with a disability. Such data could help reveal differential outcomes, for example in poverty and hunger eradication, owing to social exclusion.⁵

Interestingly, the goals around sustainable economic growth, full and productive employment and decent work for all (SDG 8) and sustainable industrialization (SDG 9) are explicitly designated under an inclusiveness agenda.⁶

In sum, while the 2030 Agenda recognizes and gives importance to social inclusion via several of the SDGs, it addresses neither the definition problematic nor the *politics* of exclusion/inclusion. The lack of structural analysis (UNRISD, 2016; Koehler, 2017) and diagnosis about the causes and most effective solutions needed to achieve the goals are perhaps one of the main barriers to fulfilling the promise to ‘leave no one behind’. Something similar can be said about the Agenda’s avoidance of clearly identifying the causes of poverty, hunger and inequality, which need to be tackled in order to achieve the agreed objective and targets. There is but one – redeeming – sentence, in the Agenda’s section outlining the current situation, which does acknowledge the connection: ‘Billions of our citizens continue to live in poverty and are denied a life of dignity. There are rising inequalities within and among countries. There are enormous

4 All UN agencies/funds and programmes and UN country team have been asked to (re-)design their work on the basis of leaving no one behind (UN CEB, 2017).

5 On the complexity of meaningful and available data see UN IAEG-SDGs (2018), which classifies SDG-relevant indicators into those that conceptually clear, have an internationally established methodology, and data are regularly produced (‘tier one’); those that are conceptually clear, have an internationally established methodology, but data are not regularly produced (‘tier two’); and those where no internationally established methodology or standards are yet available for the indicator (‘tier three’).

6 As these particular SDGs do jar with the notions of sustainability and planetary boundaries that inform the rest of the Agenda, this has been met by analytical and political misgivings in some academic and CSO circles.

disparities of opportunity, wealth and *power*' (United Nations, 2015, para 14, emphasis the authors). This is not however expanded, and therefore the 'elephant in the room' continued to be undercover even in the most ambitious agenda the international community has ever had.

This is the place to remind readers that in terms of policy advice, the UN multilateral discussions beyond the development agenda-setting over time have provided a series of normative frameworks to address exclusion. For example, ethnicity-based exclusion is addressed by the International Convention on the Elimination of All Forms of Racial Discrimination (CERD) of 1965. With respect to gender-based exclusion, the international community adopted early the Convention on the Eradication of all forms of Discrimination against Women (CEDAW) (1979), and complemented it later with the Beijing Platform of Action (1995), as normative frameworks intended to inform national legislation and policy-making on women and girl children's rights. CEDAW is binding on those states that have ratified it. Another inclusion framework is the UN Convention on the Rights of Persons with Disabilities (CRPD), adopted in 2006. The Declaration on the Rights of Indigenous Peoples (UNDRIP), adopted in 2007, while not binding, has become influential in recent years.

Social inclusion in EU debates

In terms of regional debates on inclusion, the European Union Summit in Lisbon in 2000 turned to the promotion of social inclusion, and provided some clues to assess the nature of the concept. The concept of social inclusion replaced poverty as the guiding concept for policies in the European Union. Social exclusion here refers to patterns of systematic social disadvantage associated with long-term unemployment: in other words, being excluded from the workforce and the labour market (Levitas, 2006). EU member states are in this context required to develop plans for combating social exclusion, based on the open method of coordination (European Council, 2000). The method applied basically consists of common objectives agreed at EU level which in due course need to be achieved at country levels. This encompasses facilitating employment and access to resources, rights, goods and services; preventing exclusion; and helping the most vulnerable. These objectives need to be operationalized, and adequate modes of measurement are to be developed from a common understanding of the concept of social exclusion/inclusion. The dominant European discourse revolves around a set of indicators

prepared by the EU Social Protection Committee (in October 2001) and endorsed by the Laeken European Council (in December 2001).

The lack of decent work is, however, just one of the many dimensions of social exclusion. This narrow approach has consequences for its definition, its measurement – and notably for policies, hollowing out both the resonance of the notion of poverty, and the need for complex and sophisticated policy-making to address all aspects and the power dimensions of social exclusion processes and outcomes. Nevertheless, Europe is the region where the conceptual and political debate is more nuanced, although overlappings and the lack of a clear definition of the boundaries between social exclusion and poverty persist even in those EU departments that are following up the process (see for instance Ireland, 2016).

C. What does this volume offer?

As outlined above, the overarching aspiration of the 2030 Agenda is to leave no one behind, and more concretely to eradicate absolute poverty by 2030 (SDG 1), ensure gender equality (SDG 5), overcome inequalities (SDG 10), and build peaceful and inclusive societies (SDG 16). There is also an orientation to inclusive cities (SDG 11). Yet, as the conceptual analyses and case studies compiled in this volume almost unanimously conclude, power relations bias, weaken, undermine or even pervert policy measures conceived to achieve such social justice and inclusion outcomes. Social exclusion is systemic (see Spicker, Chapter 3, Delamonica, Chapter 2 and Telleria, Chapter 4) – it is part of an encompassing socio-economic and political structure. Within its structural character, it is complex, playing out in different ways from the interpersonal (see Durán, Chapter 5 and Audin, Chapter 8) to the level of policy choices and their implementation (Kumar, Chapter 9; Kurian and Singh, Chapter 11). On the top of that, there are evident conceptual problems related to definition and operationalization which need to be addressed as a first step towards adequate systems of measurement and monitoring.

In the first section of the volume on concepts, key themes are based around conceptualization issues, and notably on how power plays out in the politics of social exclusion. Delamonica, for example, offers a detailed discussion of understandings and definitions of social exclusion, discrimination and related concepts. The varied terminology used to explain the phenomenon of social exclusion is associated with different explanatory patterns regarding the causes

and consequences of inequality. analyzes of social exclusion processes display different approaches across various disciplines, with economics, sociology and the legal sciences having divergent views on the drivers of exclusion and on the most effective policy responses. These varied approaches both present analytical challenges and affect policy choices. Unravelling the differentiations is important to assure clarity over the exact aspired form and coverage of inclusion policy (see Delamonica, Chapter 2).

That leads to a core theme of the volume – the politics of social inclusion as a relational issue characterized by dominance and power (also relational concepts themselves). As Spicker puts it when focusing on poverty and its relationships with exclusion, ‘Poverty is at root a relational concept, which can only be understood by locating the experience of poor people in the social and economic situation where they are found’, and ‘exclusion, a concept which is self-evidently relational, come(s) closer to the idea of poverty than much of the academic literature on poverty in itself, offering a way to escape from the limitations of conventional models of poverty’. As a history of poverty and of social exclusion discourses shows, ‘conventional discussions of poverty treat the concept in a narrow and limited way, as if it could be understood solely in terms of income, resources, capabilities or the circumstances of individuals. Poverty consists in a set of relationships, not a state of being that can be treated in isolation from the society and networks of relationships that people experience’ (Spicker, Chapter 3). Conversely, and more helpfully, ‘the idea of exclusion is rooted in a relational understanding of people’s circumstances’, so that ‘discussions of exclusion come closer to the idea of poverty than much of the literature on poverty in itself, offering a way to escape from the limitations of the academic analysis of poverty’ (again see Chapter 3).

The bridge chapter between the conceptual and the suite of case studies problematizes the UN discourse on development agendas. Telleria argues that ‘the UN has failed to reflect on the power relations that have shaped the unequal international order’. Telleria’s critique is that the UN development agendas – understood as various multilateral agreements, most recently the Millennium Agenda and the 2030 Agenda – tackle ‘political issue(s) in technical terms – by promoting supposedly neutral win-win policies intended to improve everyone’s life’. They therefore ‘exclude ... alternative perspectives on the causes and possible solutions of underdevelopment, poverty and inequality. As a consequence of this exclusion, the Millennium Declaration and

the Agenda for Sustainable Development promote policies without politics: they propose courses of action without holding a plural and inclusionary political debate' (Telleria, Chapter 4). The obliviousness to power relations, and the need for policies that tackle hierarchies, dominance and power head on, is recognized as a central weakness of the 2030 Agenda. This is an important finding not just to illustrate the limitations of UN intergovernmental agenda-setting; it applies similarly to national policy-making that purports to advance social inclusion – but without addressing entrenched power hierarchies.

The second section of the volume presents case studies from a wide range of countries. They offer unsettling insights from practice.

The first level of these findings relates to personal and community-level processes of exclusion. In Bolivia, for example, the '*Vivir bien*' philosophy is an alternative paradigm of development based on a pluralist vision and a promised respect of indigenous or peasant communities and their choices, which addresses the issues of inclusion and exclusion. Implementation of the '*Vivir bien*' model has however 'been erratic and partial' (Antequera Durán, Chapter 5). Despite a number of transformations that took place in Bolivia during past years with positive impact on socio-economic outcomes, income poverty owing to a lack of decent employment persists, making it difficult for adults to balance their roles as the primary carers for their family, and as providers of the family's material basis. This is seen as the main driver of dysfunctional families, in turn generating societal exclusion. Fieldwork in La Paz, for example, reveals that 'poverty, exclusion and inequality result in the progressive deterioration of social relationships, negatively influencing affective ties and notions of identity'. Antequera Durán therefore makes the case that national and local governments should emphasize conditions for the strengthening the community if we wish to genuinely overcome social exclusion.

A similar nexus is documented in case studies from urban communities in two Caribbean countries, Jamaica and Haiti. Patriarchy, poverty and the lack of employment, arduous access to health facilities, and the slum location itself generate extreme forms of violence at the interpersonal level. The processes of economic and social exclusion in turn recreate violence (Henry-Lee, Chapter 6). Physical violence and destruction of personal property are also reported in case studies from two villages in India (Kurian and Singh, Chapter 11).

In many of the country experiences presented, hierarchical power relations perpetuate deeply embedded processes of social exclusion at the community level. The processes of social exclusion

are complex and multilayered. Gender is the overarching vector of exclusion in all the case studies, regardless of the geographic location. It is 'interlocking and cumulative' (Kurian and Singh), exacerbating all other drivers of exclusion. Caste (Kurian and Singh; Koehler and Namala, Chapter 12; Kumar, Chapter 9; de Wit, Chapter 10), ethnicity (Henry-Lee, Chapter 6; Antequera Durán), location (Audin, Chapter 8; Henry-Lee; Kumar; de Wit), as well as ability, age and migrant status (Audin, Kumar) are the other social exclusion determinants revealed in the case studies. In India and other parts of South Asia, exclusion of communities runs along combined lines of patriarchy and caste (de Wit, Kumar, Kurian and Singh, Koehler and Namala).

These each have an inbuilt interface with income poverty (Spicker, Delamonica, Koehler and Namala, Henry-Lee) and with cultural poverty (Antequera Durán). The case studies moreover illustrate that social exclusion is relational – determined by interactions which are subject to power asymmetries and hierarchical stratification. As a result, dominant groups, to their own benefit, divert public resources or extract personal resources, exclude people from income-earning opportunities or access to social services, and exert violence against disadvantaged groups, based on 'socio-religious and cultural practices' (Kurian and Singh).

A second level of findings from the case studies underpins the critical point that national or local-level policies reveal a systemic disconnect. For example, caste-based exclusionary practices such as untouchability undermine poverty alleviation schemes in rural India, as illustrated in the research of Kurian and Singh: 'in spite of progressive legislations, schemes, central monitoring system and a pro-Dalit political party in power, there has been no significant change in the livelihood options' in the villages they studied. They add that 'local power relations revealed the limitations of laws and policies as instruments for changing the lives of people who function in different social fields associated with informal, hidden rules that are often stronger and where compliance is enforced face-to-face, at micro-level' (Kurian and Singh, Chapter 11).

The research from Bolivia, Jamaica and Haiti, and the studies from India reconfirm that disadvantaged communities are excluded, or adversely included, on grounds of ethnicity, income and political affiliations (Antequera Durán, Henry-Lee, de Wit). Garrison communities in Jamaica for example were political enclaves built to secure votes after independence, but they have become 'characterized by chronic poverty, social exclusion, violence and misery' and a

systematic lack of access to quality education (Henry-Lee). In the case of urban planning outcomes in Delhi, women are the most affected, losing their employment opportunities, and facing additional mobility restrictions. In addition, those displaced are migrants from other states in India, engaged in the informal sector, who have no networks into local power centres (Kumar).

Indeed, a number of the cases summarize field work in urban or village settings. Urban slum dwellers see their rights violated in processes of city planning; this is the case in cities in Jamaica and Haiti, in Uganda and in India (de Wit; Kumar; Henry-Lee; Siame, Chapter 7). In China, social work is caught in the tension between providing support to disadvantaged citizens and controlling their access to social assistance, and even being complicit in the razing of their settlements or imposing family planning (Audin, Chapter 8).

The volume's concentration on the local level is important for two reasons. The local environment is where individuals and communities experience exclusion or inclusion – be it adverse or empowering – and can coalesce to organize and fight for the realization of their rights. Kumar illustrates how spatial exclusions cause and perpetuate deprivation, with seemingly inclusionary planning policies ending up in multiple exclusions. In his study, public-private partnerships in Delhi resulted in the 'displacement of citizens from one place to another' and 'also exclusion from work, particularly for poor women'. One conceptual notion in this connection is the right to centrality – the right to the urban (Kumar, based on Henri Lefebvre) – which encompasses rights to social services, infrastructure, and – extremely importantly – the right to decent and secure housing. This plane of discussion, second, interfaces with SDG11 which of itself was a major innovation in the evolution of UN development agendas – the recognition of space as constituting a key area for human dignity, identity, well-being, and hence policy-making as well as collective action.

As mentioned earlier, the UN Agenda for Sustainable Development devotes an entire goal to cities and human settlements. Target 11.3 deserves quoting: 'By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries.' Many of the targets are about housing, transport systems and public spaces for all, with a special emphasis on disadvantaged groups. Likewise, the New Urban Agenda (UN Habitat, 2016) seeks 'to promote inclusivity and ensure that all inhabitants, of present and future generations,

without discrimination of any kind, are able to inhabit and produce just, safe, healthy, accessible, affordable, resilient and sustainable cities and human settlements to foster prosperity and quality of life for all' (article 11). This outcome document commits to leaving no one behind, ending poverty and ensuring environmental sustainability (article 14), and calls for the participation of all actors. The field work presented in this volume illustrates the urgency of living up to the promises of the 2030 and New Urban agendas.

In addition, findings from the volume strengthen the thesis that processes of social exclusion are reinforced by a lack of democracy. In Mumbai, 'patronage democracy', observed in the slums, 'malfunctions for the poor as it neither gives them real voice nor helps towards uniform pro-poor services and policies' (de Wit, Chapter 10). It also isolates citizens, as they seek support through vertical relationships with powerful players in the community, rather than coalescing for collective action in horizontal relationships. In several cases, individuals and communities witness impunity for violations of their rights, despite legal provisions in place (Kurian and Singh, Chapter 11).

In urban China, residents' committees are in charge of implementing public policies, such as the urban registry system, family planning and birth control policies, as well as social assistance programmes. They are also tasked with organizing sociocultural activities, or mediating conflicts among neighbours. This is a broad and invasive remit, demonstrating an understanding of social inclusion that is opposed to the empowering notions of social inclusion that characterize the academic literature or UN normative frameworks.⁷ Audin (in Chapter 8), based on ethnographic work in Beijing and Chongqing, highlights the challenges that social workers face. On the one hand, they are assigned to enforce public policies regarding access to social assistance in cases of disability or unemployment, or compliance with family planning laws. The community-level social work also controls residents and serves to exclude rural migrants who until recently had no residence rights in cities, co-opting neighbours into scrutinizing entitlements to social assistance or public housing. On the other hand, they have, and do internalize, a responsibility for social care work, designed to help the 'weak and vulnerable groups' in each neighbourhood. Their roles hence oscillate between a conveyor of state control of the family and the individual, and social work for social inclusion. While not characterized as such, this constitutes a

7 On recent political developments in China, see Strittmatter (2018).

form of adverse inclusion, also experienced in other settings, such as is apparent in the Mumbai case (de Wit, Chapter 10).

On a third level, many of the examples showcased in the volume illustrate the impact of global processes. They reveal the socio-economic impact of neoliberal policies, a topic not often elaborated in the context of social exclusion research. Public services – access to social services and basic urban infrastructure such as drinking water and sanitation, and garbage collection – have been dismantled and privatized. This seems to be the case even in the context of the state-party form of governance in China. In Mumbai, the 'local state has shrunk, with services increasingly provided by the private sector, so that poor people are squeezed between reduced public services and costly private ones. In contrast, private sector firms benefited much: they have a strong voice in governance, while financing and influencing politician's election campaigns' (de Wit). In several situations, incorporation into the system is 'adverse' – against the objective interest of the individual or community concerned.

Harking back to the overarching question of power relations in the multilateral context (Telleria, Chapter 4), an important observation is that exclusions at the personal or community level are mirrored by exclusionary politics affecting nation-states. As Henry-Lee argues for the Small Island Developing States (SIDS), they are marginalized systematically by the functionings of international monetary policy, international trade and development assistance. Despite commitments to consider the special geo-climatic challenges that SIDS face through dedicated programmes of action, the international power hierarchy plays out to the detriment of these smaller countries (Henry-Lee, Chapter 6).

The logical insights are twofold. Firstly, remedies need to be sophisticated if they are to overcome poverty and social exclusion, and lead to genuine transformation at the personal, the socio-economic and the political levels. Thus, the politics of social inclusion need to be multipronged, multidisciplinary and multilayered. Secondly, they need to tackle power relations. This position is shared by all the contributing authors, even when they come from diverse disciplines and schools of thought. What the volume contributes here is glimmers of hope.

At the conceptual level, it shows the connections between poverty and exclusionary processes which create and reinforce poverty. As Spicker puts it, 'discussions of exclusion come closer to the idea of poverty than much of the literature on poverty in itself, offering a way

to escape from the limitations of the academic analysis of poverty'. There is a need for a 'distinct view of society, based on networks of social solidarity' (Spicker), echoed in other chapters of the volume (de Wit, Kurian and Singh, Antequera Durán, Siame). There are indeed many instances of collective action for policy change.

In the policy approaches reviewed, there is an agreement that inclusion policy needs to be based on the ethics of social solidarity (Spicker). It needs to be genuinely participatory and empower the excluded (Kumar, Siame, de Wit). As Antequera Durán argues on the basis of the UN Development Programme (UNDP) *Human Development Report* (2016, p. 8), for the marginalized and deprived, collective agency can be more powerful than individual agency; an individual is unlikely to achieve much alone, and power may be realized only through collective action.

Policy action also needs to be multipronged (Kurian and Singh, Koehler and Namala), as follows from the analysis that social exclusion operates at so many levels. One example is community urban planning processes in Kampala, where urban slum dwellers created civic movements and partnered with local stakeholders to achieve gains in inclusive urban development: 'mechanisms have included use of boycotts, protests, propositions of alternative city development pathways, negotiations, and the introduction of leadership structures that seek to lead and not to be led by city officials and politicians' (Siame). Siame argues for a 'co-production' approach in urban planning: by 'consciously and cautiously engaging with issues of deep difference, diversity, livelihoods, a weak state and a divided civil society, co-production ... crafts a normative position that attempts to address social justice and equity issues'.

Another approach was developed by civil society in India, advocating a five-layered approach to social inclusion (Koehler and Namala), which may serve to overcome the shortcomings in the policy responses in place in many countries in South Asia, where there is also a long history of attempts to overcome some forms of exclusion, notably gender discrimination and violence, and caste-based exclusion. This is especially important because of the many policies in place at the government level (see overview tables in Kumar and in Koehler and Namala), which have insufficient traction or are undermined by lack of political will and financial resources, coupled with the effects of power hierarchies at the local level.

Completing the circle which started from the aspirations of the UN Agenda for Sustainable Development and its goals around

inclusion is a reference to related UN processes which can be drawn upon to claim and promote social justice. Established human rights soft law, such as the UDHR, and the many conventions on gender and other vectors of inclusion, can provide ‘policy anchors’ (Koehler and Namala) to achieve social inclusion and reach the vision of the 2030 Agenda to leave no one behind.

D. The way forward: the research and policy nexus

The remit of CROP and of UNESCO, and of the engaged academic community more broadly, is to produce meaningful knowledge to inform policy. For instance, the 2016 Report on challenging inequalities by the International Social Science Council (ISSC) (CROP’s mother institution), UNESCO and the Institute of Development Studies (IDS) identifies as its first priority to ‘increase support for knowledge production about inequality, and processes of social inclusion and exclusion’ (ISSC et al., 2016, p. 31), and makes an unequivocal case for the production of social science research on inequality and elucidating how transformative pathways greater equality (pp. 274, 277). Similarly, the International Conference on Humanities held in Liege, Belgium from 6–12 August 2017⁸ reiterated the responsibility of scientific research for achieving good governance by highlighting the relevance of interdisciplinary research and the fundamental contribution of the humanities in general.

This volume is an effort to create such a constructive bridge from research and analysis to policy formulation and implementation, and its critical reflection. Thus, an overarching question is how the principle of social inclusion can be transferred from the normative commitment of abolishing social exclusion and eradicating poverty, into policies that address the asymmetrical power relationships that create the different forms of exclusion. How can we address the processes in which the terms of inclusion are adverse, disempowering and inequitable? Would an approach focusing on the politics of inclusion be politically more relevant than approaches based on poverty eradication, and the commitment to leave no one behind, as advanced by the UN Agenda 2030?

This volume exposes relevant issues that need to be solved for the international community to move forward in the effective implementation of politics promoting social inclusion. First of all, it is indispensable to clarify what social inclusion is, identify indicators to

8 A joint initiative of UNESCO and the Association of Philosophy and the Humanities.

measure it, and then agree on feasible mechanisms to assess progress toward the achievement of inclusion-related SDGs. Second, there is an overarching conclusion in this volume around the recognition of the decisive role of power relations and of intersectionality, which creates and recreates social, political and economic exclusion. Effective policies on social inclusion should therefore depart from that fact of social life.

These are key findings that are supported by this volume and in previous contributions. To produce usable knowledge and ideas for transformative policies is a systematic task that requires long-term support – at national and international levels – by the agencies responsible for the implementation of policies to achieve the SDGs. Such support also needs to include the follow-up and monitoring processes indispensable to making the necessary adjustments during the process that ends in 2030.

This volume is a modest contribution towards that end. We intended to generate questions, problematize a complex issue and provide a few provisional answers articulating different views, perspectives, cases and disciplines in a collective process to produce meaningful knowledge. As usual, there are shortfalls that do not impede progress but encourage further research and discussion.

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Notes on the contributors

Editors

Gabriele Koehler, lead editor, is a development economist trained in Germany, and a senior research associate affiliated with the UN Research Institute for Social Development (UNRISD), Geneva. She is a former UN official, with over 25 years of experience, and a former Senior Fellow of the Academic Council of the UN System (ACUNS). Her research and advocacy work focuses on the UN development agenda and human rights, and on social and economic policy, notably social protection. She is on the governing board of the UN Association of Germany.

Alberto D. Cimadamore is CROP scientific director, professor of theory of international relations at the University of Buenos Aires, and researcher at the National Council of Scientific and Technological Research of Argentina (currently on leave). He holds a Ph.D. in international relations from the University of Southern California (USC), Los Angeles. His publications focus on the political economy of poverty, international development and regional integration.

Fadia Kiwan is the chairperson of the Scientific Advisory Committee of MOST, at UNESCO. She holds a doctorat d'état in comparative politics from Paris1-Sorbonne and a certificat d'aptitude au professorat de l'enseignement du second degré (CAPES) in philosophy and psychology from the Lebanese University. Her research focuses on public policies in a comparative perspective, especially in the field of policies on women's inclusion in the Arab states. She has been the director general of the Arab Women Organization (AWO) since June 2018.

Pedro Manuel Monreal Gonzalez is a programme specialist, Sector for Social and Human Sciences, UNESCO Paris, and member of the secretariat of MOST. He holds a Ph.D. in economics from the University of Havana. His research interests include social inclusion, the research– policy-making nexus, and Small Island Developing States (SIDS).

Contributors

Nelson Antequera Durán holds a Ph.D. in anthropology from the National Autonomous University of Mexico. His current position is associate researcher of the Centro AGUA–UMSS, Cochabamba, Bolivia.

His main research interests include cultural diversity, social inclusion, water, climate change and development in Andean societies.

Judith Audin is a researcher at the French Centre for Research on Contemporary China (CEFC, Hong Kong) and an associate researcher at CECMC (Paris). She is the chief editor of the journal *China Perspectives*. She holds a Ph.D. in political science from Sciences Po, Paris. Her research interests include power relationships at the neighbourhood level, an ethnographic study on urban residents' committees in Beijing, and the ethnography of post-industrial transformation (Shanxi, Datong). Her current research focuses on abandoned places and contemporary ruins in China.

Joop de Wit is a political anthropologist retired from but still associated with the International Institute of Social Studies of Erasmus University (ISS). The Hague, as associate professor in public policy and development management. He taught in the fields of governance, policy and political science, and his research is on urban poverty and governance issues, decentralization, participation and the (formal but especially informal) interfaces between poor communities, local government, politicians and the state. A recent book is *Urban Poverty, Local Governance and Everyday Politics in Mumbai* (2017).

Enrique Delamonica is senior statistics specialist (child poverty and gender equality) at UNICEF Headquarters, New York. He has held senior positions in social policy in UNICEF Nigeria and the Latin America and Caribbean Regional Office. He is a CROP fellow, and holds a Ph.D. in economics from the New School for Social Research, New York. His research focuses on equity and discrimination, child poverty, poverty reduction and human development strategies, social protection, financing social services, and the impact of macroeconomic trends on child welfare.

Aldrie Henry-Lee is a professor of social policy and university director at the Sir Arthur Lewis Institute of Social and Economic Studies (SALISES), University of the West Indies (Mona Campus), Jamaica, West Indies. She holds a Ph.D. in sociology from the University of the West Indies, and has conducted research and published in the areas of poverty, deviance, social protection and children's rights.

Ashok Kumar is professor of physical planning, School of Planning and Architecture, New Delhi, India, with a Ph.D. from the University of Liverpool, UK. He trained as a geographer and a city planner, and his research focuses on spatial justice and equity.

Rachel Kurian is senior lecturer in international labour economics at the International Institute of Social Studies, Erasmus University, Rotterdam, Netherlands. Her research focuses on economic

reforms and labour, plantation labour, trade unions, child labour, elderly protection, gender politics and women's rights, poverty and social exclusion. Her recent publications include *Class, Patriarchy and Ethnicity on Sri Lankan Plantations: Two centuries of power and protest* and *Natesa Aiyar and Meenachi Ammal: Pioneers of trade unionism and feminism on the plantations* (both with Kumari Jayawardena, 2016).

Annie Namala is co-founder and executive director of the Centre for Social Equity and Inclusion (CSEI), Delhi. She is also co-convenor of the Wada Na Todo Abhiyan (national campaign on governance accountability) (WNTA), working on poverty and social exclusion. She has over two decades of experience in community mobilization, policy and advocacy in India, working with marginalized communities to end caste-based discrimination, strengthen community-led organizations (CLOs) and promote social equity and inclusion among youth from vulnerable communities.

Gilbert Siame is a lecturer and researcher at the Department of Geography and Environmental Studies, and director, Centre for Urban Research and Planning, University of Zambia. He holds a doctorate from the University of Cape Town in South Africa. His research interests and projects include urban informality, urban sustainability, climate change and cities, urban governance, transdisciplinary research methods, and the interface of planning theory and practice in the global South.

Deepak Singh is a grassroots worker and development consultant whose research and experience has focused on the empowerment of marginalized communities in South and South-East Asia, including Dalits, Tribal communities and women's rights, challenging their exclusion and discrimination, and improving their livelihood, food and security needs.

Paul Spicker is an emeritus professor of Robert Gordon University, Scotland, and a CROP fellow. He works as a consultant on social welfare, and has done work for a range of agencies at local, national and international levels. His research includes studies related to benefit delivery systems, the care of older people, psychiatric patients, housing management and local anti-poverty strategy. His published work, mainly focusing on poverty, social security, policy analysis and the theory of social policy, includes eighteen books and some ninety academic papers.

Juan Telleria holds a Ph.D. in philosophy from the University of the Basque Country (UPV/EHU). He is a postdoctoral researcher at the HEGOA Institute for Cooperation and Development Studies, UPV/EHU, researching questions of development, identity and power.

