

SOCIAL EXCLUSION AS A MORAL PROBLEM

The article describes the issue of the social exclusion as a moral problem and ethical commitment. The meaning, main causes, forms and different solutions of the social exclusion problem are described.

Keywords: *social exclusion, moral problem, ethical commitment, society, social policy.*

Problem statement. One of the basic disposition of every man is freedom of making up decision concerning one's own existence. Universality of such a conviction is seen in a well-known saying: "Every man is the architect of his own fortune". This saying includes a hidden assumption that all people are born equal and have similar possibilities at their disposal. However, in every society there are two groups of people, of which majority is doing well in the conditions of free market economy and minority is helpless and is characterized by lack of ability to look after one's own business. Between these two groups there is still one middle group which functions in a so called "grey zone", formally qualified as minority but in fact it takes part in social life. In general, it is a double beneficiary because it also takes advantage from the means of the welfare for the helpless and it also gains unregistered income because of functioning at the work market. It is obvious that for every society this middle group poses a definite threat because its salary is not charged with the costs of taxes and social and health insurance premiums. Moreover, they also take advantage of the means coming from the premiums paid by legally employed people. Therefore, they deprive the most needy ones of the part of the means designed for social support and they also diminish dignity of honest work. The moral problem here is not only the fact of heartless use of inefficiency of welfare system by such people but mainly moral agreement to such actions by the people who should be provided with such help. It is also expressed by a slow moral degradation of people who are constant beneficiaries of the welfare. Their situation can be initially called a disadvantageous economic situation but it quickly changes into an oppressive social situation. Such people stop to be desired neighborhood for this part of society which functions successfully in a market economy. Social isolation which they experience has therefore two sources. One of them has an external character and results from falling out of the work market and is also connected with the lack of financial means which makes it impossible to take part at the market in a role of a consumer (holidays, culture events, visits at the shopping centers, etc.). Second level of isolation has an internal character and, as it seems, is caused by a simple shame in front of the society because of one's helplessness and indigence (See: interesting notes of possible sources of shame for oneself in Elzbieta Struzik) [2, p. 208–210]. Adam Smith once rightly noticed that a man who hasn't got decent clothes is ashamed of appearing in a public place.

It is difficult to state which of these levels isolates deeper from the rest of society but their common result is finally the phenomenon of social exclusion. Among theoreticians of economy and politics there is a dispute concerning the size of this phenomenon and defining the moment in which it starts. Accepting income criterion is a kind of compromise but dwelling standards or the state of health are not less essential. Income criteria in author's conviction describes therefore exclusively the state of emergency and not exclusion alone. Looking from this perspective, the problem should be considered from other point of view because erroneous assumptions result in irrelevant strategy of help given to the excluded. Therefore, in this article there will be raised the question of moral commitment of society and defining of the boundaries of giving help to the excluded people. This is strictly an ethical task because society cannot evade such help but at the same time has to clearly set the rules and criteria of giving such help. The lack of such rules and criteria causes that the most of such help is used by those who use welfare as an easy source of income.

The aim of the paper is to describe meaning, main causes, forms and propose different solutions of the social exclusion problem.

Previous research. The problem of social exclusion was investigated in the works of such researchers as A. Power, W. J. Wilson, Li Yi, F. Moulaert, E. Swyngedouw, A. Rodriguez, A. Honneth, Philippe Van Parijs, G. Deleuze, J. Rawls, K. Marx.

Main body. The notion "social exclusion" was used for the first time in the book published in 1974 of French economist René Lenoir "Exclusion: one Frenchman for ten" (*Les exclus: Un Français sur dix*) [5]. In economy this notion was adopted in the English issue as leading to a social division into *insiders/outsiders*. Literally, it is used to describe this group of people which, for different reasons, is not able to look after their own business independently. One can consider this problem in the categories of biological terminology because lowered ability about to adopt to changing conditions of a social life decides about exclusion of a given person. Only when we consider the problem from this perspective one can avoid a charge that a man becomes excluded for his/her own request and such viewpoints among liberally-minded intellectual and political elites are not rare. To be honest – a person who is able to take care of one's own business independently is not excluded, however uncomfortable situation he/she would be in because exclusion consists of element of helplessness, not adjusting to the surrounding social world. Statement of such status does not require any special abilities, however it is only by chance that exclusion is identified with poverty. For assuming income criterion results in dispersion of social activity and is in favour of using the gaps in legal system by a part of society which should not benefit from institutional help endorsed by the state. In this way the problem with the excluded is not an economical problem any more but also a political one. Now, the excluded, in spite of their number, do not have any possibilities of exerting pressure on political elites at their disposal, so they are not subject at the political scene. For this reason one can say that politicians do not let them die of

hunger but at the same time they have no stake in leading them out of exclusion. Even success connected with leading out of the exclusion of a group of people does not change into defined political profits. Here, we therefore touch the problem of relations connecting spheres of freedom and politics. Assuming such an interpretation, the excluded ones have to fulfill some “positive” role in the social system if they are maintained and tolerated in this state. Otherwise, discourse on freedom would not pass indifferently by the existence of those who do not make use of this freedom at all.

Market economy simplifies discourse over the problem of man’s freedom in general, because it is reduced to the problem of loss of the source of regular income. Mostly it is connected with the loss of a job which mostly constitutes relatively certain source of this income. The man who loses his/her job as if loses his/her freedom at the same time. Of course, this is an illusion but it seems to influence perception of the situation of all participants of social life. It may also happen that a man who was never cared for by anybody, at the moment of losing a job suddenly becomes “a hero” of tabloids and surely he/she will automatically find him/herself in the register of people threatened with the loss of a job. It is enough to read a popular magazine to see that it really happens. At the same time return to the job market might involve the loss of this medial status, which might cause instinctive defensive reaction inducing a maximum delay of coming of such a moment. No wonder that often the excluded ones are least interested in getting out of the oppressive state. The state of affairs is not changed by the conviction that full social safety in a market economy practically does not happen but there exist groups which are deprived of it in every dimension and they are a burning moral problem.

As there is a hypothetically possible situation in which nobody is interested in getting out of exclusion of a definite person, so at the same time it explains why the struggle with it is so ineffective. Therefore, in every liberal democracy there is simultaneously a discourse on two levels: economic and political. The order of first kind of discourse shows a conviction that the excluded ones are mainly important as “a bugbear” for those who have their job as a source of regular income. The second order requires an equal “worry” about all participants of social life. As a result: “economic order generates inevitably unemployment, however legal and political order, inspired by solidarity ethics, organizes solidarity by granting income to non-active victims of the job market” [3, p. 215].

This income is strictly rationed though and in principle aimed at a complete elimination out of the job market and therefore in spite of reducing it deepens the state of exclusion. There is also a noticeable tendency in all countries of liberal democracy in which there is a trend to change financial benefits into different substitutes which delimit the freedom of excluded ones even more. Such form of a substitute are different kinds of rations of ready-made food and manufactured goods, housing benefit, financing of meals for children, free lunches, etc. Finally it causes that the very unemployed people are scared with the threat of losing them and they do not take up any activity in order to improve their situation. Therefore,

for social ethics the most important thing is a specific challenge how to break this self-driving vicious circle. But to make it possible there must be set unequivocal parameters allowing to classify somebody to the excluded ones. This cannot be income criterion because it only acts till the moment of starting to get out of the exclusion state because it generally stops at the moment of starting of paid work. At the same time this is a critical moment when this help is maybe the most important thing. What, therefore, let us include somebody into the category of excluded people? In the report of Task Team for Social Re – integration affairs operating under the auspices of Ministry of Economy and Social Policy five groups have been considered as threatened with exclusion [1, p. 6–7]:

- 1) disabled people;
- 2) mentally ill people;
- 3) people leaving prisons;
- 4) women after giving birth of children;
- 5) addicted people.

The proposal of this team evokes many reservations because total counting of all such people would show that the problem of exclusion constitutes the margin of social life. In the meantime the situation is different because the problem is growing and for the causes indicated above, struggle with it is ineffective.

In the report of Ministry of Economy and Social Policy there has been one concept of exclusion adopted, the one that assumes that every citizen has right to education, work and social insurance, health protection, housing, using of public and having one's own means of transport and communication, to social help, rehabilitation and access to culture. Social exclusion is understood here as depriving the individuals or all groups of possibility to use one of the above rights.

In the meantime, one should possess definite abilities to fully make use of entitlements we are given by participation in a social group. Because modern culture requires from a man “that he will possess abilities needed in working, family and public life. It can be assumed that modern world requires that to possess these abilities one has to graduate from a secondary school, that this type of education is common. For example: to operate well in the modern world one has to be tolerant but also has to know how to use a mobile phone [...] Ability to make good consumer choices and also awareness of civil identity [...] let somehow find oneself in life. Without secondary education such package is difficult to transmit. And without it there starts the mechanism of exclusion starts to act, which makes the man a citizen of second category in different dimensions” [9, p. 30].

Therefore the problem of exclusion can be brought to three basic levels [8]:

- 1) problems with participation;
- 2) problems with entitlements;
- 3) problems with resources.

In Poland there exists understanding of the notion “social exclusion” proposed in 2003 by Group II of Task Team of Social Re-integration affairs of Ministry of Economy, Work and Social Policy. In the understanding of members of the Team

“social exclusion is a situation preventing from or significantly obstructing an individual or a group fulfilling social roles within the law, making use of public goods and social infrastructure, collecting of reserves and gaining income in a dignified way” [6, p. 14]. Such understanding of the phenomenon of exclusion is concentrated on three essential elements: determining situation leading to exclusion, indicating people who belong to the excluded people and indicating the spheres of public life out of which a given person has become or might become excluded. As forms of exclusion are quite variable and there is a possibility only short-term social exclusion connected with i.e. sudden loss of health, work or loss of a significant part of income, the subject of interest is permanent social exclusion, getting out of which requires the outer help.

To our point of view it is also important to look through the social exclusion as ethical commitment. Possibility of determining that somebody is at the stage of exclusion involves a kind of moral commitment to provide services in favour of people being in an oppressive social situation. One can expect in vain that members of any society will spontaneously decide for such diagnosis of the nearest social surrounding. One should rather expect activities aimed at transferring of this duty to state institutions. The consequence of such state of affairs are declarations like: “that is why I pay taxes to the state” or “it’s their own fault”. As a result, one can say that an excluding organ is the society itself. Therefore leading somebody out of exclusion is at the same time an act of renewed socializing, introducing into social life. This is not exclusively the process of coming back to the market as people responsible for social policy imagine in the most of countries. Within this return to society one should somehow learn some new principles of community life, including especially conventions and moral rules based on the principle of reciprocity. For social ethicists it is becoming more and more obvious that a man excludes him/herself out of society more than his surrounding does it with him/her. Self-exclusion is based, among others, on rejecting of the rules and principles applicable in a society out of which he/she has been excluded. Return to normal social functioning is long-term and involves new accepting of the rules which had been rejected before.

Thus, finally, the phenomenon of exclusion leads to the situation that disadaptation of an individual to the requirements of social environment is “transferred” on other people or is transferred to the next generation. “If a man in his/her life will not be able to effectively look after him/herself, that is decide for oneself, then:

- they might be cared for by institutions and civil servants feeling that they represent “the will of heaven” or “social and nature forces” with whose “imposed will” one should irrevocably agree with, which leads to making an individual dependent on their decision, to his/her intellectual and moral enslavement, incapacitation in all aspects of life [...];
- one will not be able to take care of those for whom he/she should be responsible for (first of all for the relatives and charges);

- others (following the act of mercy and compassion) will have to help this individual” [7, p. 115].

Conclusions. To change the existing situation it is justifiable to look for new strategies assuring possibility of independent getting out of exclusion. One of them are undoubtedly micro credits – the kind of ones given by Grameen Bank from Bangladesh established by Muhammad Yunus, Nobel Prize winner in 2006. They are however only efficient in these cases when the excluded ones want to change their own social status. In our conditions an excluded person has no chance to obtain such a credit and in this way one of the most effective form of fighting with exclusion is unavailable. Other form, as it seems, of effective struggle with exclusion is proposed by Jules Gazon stock of neighbourhood credits (*crédit de proximité* – CPR). They are a kind of socially rationed services but their final cost will always be smaller than institutional fight with unemployment. What is important such a form allows to free oneself of the circle of impossibility and helplessness and at the same time to keep the sense of autonomy. Gazon is convinced that by implementing his idea all people able to do any work will find socially useful job and thus unemployment has to disappear [3, p. 220]. It is difficult to share this conviction with him but in his proposal, what seems more essential, is proceeding integration of the excluded with a local society and including all citizens into the struggle with exclusion (Such opening to another man is postulated by Aleksandra Kuzior) [4, p. 120–122].

Social ethics has something to offer to politicians but this offer requires accomplishing of definite reforms and to carry them out successfully political will and sense of solidarity are more important than money alone.

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Анотація

Стефан Констанчак. Соціальна ізоляція як моральна проблема.

У статті розглядаються питання соціальної ізоляції як соціальної проблеми та етичного зобов'язання. Досліджено її значення, головні причини виникнення, форми прояву та запропоновані різні шляхи вирішення даної проблеми.

Ключові слова: соціальна ізоляція, моральна проблема, етичне зобов'язання, суспільство, соціальна політика.