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UNDERSTANDING INTEGRATION

AND

DIFFERENTIATION-INCLUSION, MARGINALISATION

AND EXCLUSION

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UNDERSTANDING INTEGRATION AND DIFFERENTIATION - INCLUSION, MARGINALISATION AND EXCLUSION[1]

Integration is an umbrella concept

During the last few years researchers at the Centre for Social Integration and Differentiation (CID)[2] have been dealing with two groups of highly related thematics: the theme of integration and differentiation and the problematics around the theme of inclusion, marginalisation and exclusion. The present paper centers on the more general theoretical considerations involved and a few of the more specific relevant to the themes within labour market studies which are central in the work of the Centre.

Integration is one of the most central themes in sociology, maybe the very most central; and one does not need to go through much of the literature on integration before it becomes clear that the concept has many different meanings and is used in many different contexts: from the classic texts of Marx, via Tonnies, Spencer, Durkheim and Parsons to the 'modern classic' writings of Lockwood, Habermas, Giddens, Luhmann and Mouzelis.

In some approaches to integration, the micro-macro dimension plays a central role or is an important, although sometimes rather implicit, principle of analysis (Habermas, Luhmann). Other approaches turn on the actor-structure dimension as a most relevant distinction (Lockwood, Mouzelis) while others again have central focus on the duality objective versus subjective (Weber) or face-to-face relations versus indirect relations (Giddens).[3]

While the notion of face-to-face interaction in modern societies increasingly becomes unsatisfactory with new means of communication such as e-mail, often the three dimensions micro-macro, actor-structure and objective-subjective are seen as related to each other in specific ways. For example, objectivism is associated with macro phenomena where in turn a structural approach is seen to be appropriate. Non-objectivism is often linked to micro phenomena where analyses of closely interpersonal relations is the proper tool. The most elaborate attempt so far to map conceptions of integration (Mortensen 1995), however, concludes that it is helpful to keep the three dimensions separate.

So too in contemporary political discussions and in a good deal of empirical work, the notion of integration is applied in numerous different ways: from integration of immigrants

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[2] The Centre for Social Integration and Differentiation (CID) was established in 1993 on the basis of a grant from the Danish Social Science Research Council.
[3] For a first attempt to classify different types of integration concepts into a chart, see Nils Mortensen (1995). Later analyses, also by Mortensen, however, have suggested that the concept of integration encompasses so many dimensions that a "total mapping" is a limitless task and therefore meaningless.

and psychiatric patients into the rest of the society, via integration of unemployed and labour market marginalised people into the labour market, to integration of new nation states into the European Union or of predator states into the westernized ways of thinking.

Another point is that the many different conceptions of integration and the many different connotations in which the concept is used should not be seen as some error to be avoided by all means; nor should the goal be a single unitary conception of integration in society. This is because the different conceptions and the different connotations reflect a real complexity in society. To put the point a little more precisely, they reflect the fact that a diversity of observations about 'integration in society' can often be made at one and the same time, without any of them standing out as irrefutably more salient than the others. Confusion over concepts and connotations here arises when society can be observed from quite different yet nonetheless all relevant viewpoints.

The different conceptualisations are then, far from always in conflict with each other but reflect a real complexity in society. They may go to show that a number of different observations of 'integration into parts of society' *are complementary and not competing. Society simply needs many different conceptions of integration at the same time.* A confusion about concepts and connotations may reflect situations where society is observed in ways that may seen mutually contradictory yet can be taken also as complementary. For example, the way the economic and the political subsystems are integrated or not integrated, cannot and should not be analysed by the same concepts used to analyse integration of physically handicapped or integration of new member nations into the European community.

So, one general conclusion is that the social sciences need a variety of integration concepts and another again is that integration is an umbrella concept, which encompasses a large number of ways the concept can be understood and will be understood in the future.

But even within the same context, and within the same positions as to the dimensions micro-macro, actor-structure, objective-subjective and face-to-face relations versus indirect relations, the concept of integration can have completely different meanings. Let us take, for example, Mouzelis' ideal typical suggestion for four modes of integrating ethnic minorities (Mouzelis 1995). First, he says, there is the compartmentalized mode of integration where the different cultural groups exist side by side each in a highly self-sufficient manner, with a bare minimum of cultural communication and exchange. Secondly, there is the monological type of integration where the preponderant culture sets out to dominate totally by endeavouring to obliterate the internal logic and dynamic of all other cultural traditions. The third mode of integration suggested by Mouzelis is what he calls syncretic integration which entails a highly eclectic mixture of elements from various cultural traditions that fails, however, to take account of the internal logic or specific history of these traditions and thus remains indifferent to the origin of these cultural elements and to how they relate to each other. Finally there is communicative integration, inspired by Habermas, which respects the autonomy and internal logic of the various traditions, while insisting on building two-way bridges between them.

From this example we can draw another general conclusion: that not only the connotation in which the concept of integration is placed but also *the specific meaning (sense, understanding) of the notion integration should be as precise as possible.*

Furthermore, from what has been said so far we can draw one more general conclusion: that attempts to classify all the various types of integration are pointless. There is no end to meaningful classifications.

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Differentiation comes before integration

One often finds not only politicians but also commentators and even social scientists talking about 'integration' or 'integration into society'. This is, however, not very informative or enlightening unless the speakers then at least specify: a) integration into which part of society; b) integration in what connotation and c) in what sense/meaning/understanding of the word.

From the first requirement, specification of integration into which part of society, one can start approaching the concept of differentiation. For it should now be clear - at least for those who have agreed with the argument so far - *that differentiation comes before integration*; and that it is meaningless to start choosing among the many different conceptions of integration before one has made clear the types of societal differentiation into which the degree of integration is to be examined. This is logic: without differentiation in the society there is no need to talk about integration since everyone and everything would *ipso facto* be integrated. It is only with the existence of differentiation that it becomes meaningful to talk about integration. Consequently, before it is meaningful to choose among the various connotations and among the different understandings of integration, it needs to be made clear how the society's differentiation is conceived and which of the prevalent features of differentiation are the most important for the types of problem to be analysed.

According to most sociological theories, integration and differentiation do not stand in opposition to each other. Spencer, Marx, Durkheim, Parsons, Habermas and Luhmann work, each in his own way, with models of growing societal differentiation followed by new types of integration and its opposite, disintegration.

Spencer saw societal development happening by way of an evolutionary trend towards increasing differentiation followed by changing types of integration. In industrial society he thus envisaged that a specific agency for integration, such as the state, was not necessary any longer because integration would come about of its own, by means of something like Adam Smith's hidden hand.

Marx did not use the terms 'differentiation' and 'integration' but he was the first to distinguish social (dis)integration (of actors) from system (dis)integration (of institutions). And as long as economic reductionism is avoided, the Marxist paradigm still seems to offer the most theoretically fruitful linkages between institutional analyses and analyses in terms of actors' strategic behaviour. The propensity to class antagonism (social disintegration) generally is a function of production relationships (including intra-class identification and communication); the dynamics of class antagonism, however, clearly arise from progressively growing contradictions in the economic system (system disintegration). The conflict which is then decisive for change is the system conflict stemming from contradictions between property institutions and forces of production. So Marx work goes towards interpretation of development in terms of incompatibilities between institutionalized complexes, as well as in terms of how actors do or do not perceive such incompatibilities. He analysed capitalist societies both in terms of growing institutional contradictions and in terms of agents' struggles; and he then posed the ever relevant questions: under what conditions does system disintegration lead to social disintegration? What are the complex ways in which system contradictions become or do not become associated with the development of class

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consciousness, class organisation and class action?[4]

Durkheim's famous model centred on a change from mechanical to organic solidarity. Durkheim saw the integrating mechanism in modern societies as a new kind of social morality holding together people who are differentiated according to their diverse roles in the occupational structure. But Durkheim also coined the term anomie to describe a situation where organic solidarity had not developed, the results being, among others, industrial conflict and anomic suicides.

With Talcott Parsons the concept of system becomes crucial. Even though evolution means a continuous growth of differentiation into systems and further differentiations into subsystems, the process of development is kept together or 'integrated' through the ability of the cultural system to secure the necessary normative integration.

Jurgen Habermas' and Niklas Luhmann's theories represent a significant increase of internal complexity in conceptions of differentiation and integration. We shall return to some parts of both theories below.

There is, as noted, no general agreement about which are the most outstanding types of differentiation in modern society. In general, however, differentiation is used as both a broader and weaker concept than integration, it may denote, on the one hand, just a classification of certain items (countries, colours, etc.). On the other hand, the term is sometimes deployed to characterise the evolution of whole societies or their structural make-up: whether the predominant characteristic of modern societal differentiation is class division or functional differentiation, a debate that goes back to the contrast between Karl Marx and Emile Durkheim and today centres around the positions of Pierre Bourdieu and Niklas Luhmann.

The disagreement as to whether it is hierarchical differentiation (as suggested by Bourdieu) or functional differentiations (as suggested by Luhmann) which is the predominant feature of present societal differentiation may well not be open to definitive resolution. For empirical observations tend to show that present society is differentiated into both functional systems and hierarchical groups and classes (Andersen 1999; Elm Larsen 2000).

Consequently, and as a heuristic device, we have in our latest empirical studies tried to combine Luhmann's principle of functional differentiation with Bourdieu's theory of capital and distinction. We take the latter then as complementary to Luhmann's theory of differentiation while addressed to the hierarchical structures of society. This combination, which underlines the co-presence of two very different forms of differentiation in contemporary society, will now be presented.

Functional and hierarchical differentiation

Three forms of societal differentiation are prevalent in present society. Segmentary differentiation – the first of Luhmann's three forms of evolutionarily developed differentiation – implies differentiation into a number of similar units. The units may be families, ethnic groups, clans, tribes, etc. where the unit has some character of a partly self-contained community or Gemeinschaft to it, based upon the principles of co-presence and co-locality of its members.

The next type of differentiation – the second in Luhmann's evolutionary series and

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[4] See in particular Olofsson (1995); Møller (1997); Lind & Møller (1999); Andersen (1999) and Mortensen (2000).

arising from further differentiation of certain roles, e.g. chieftains and sacred roles, in the segmentary society - is the hierarchical differentiation based on the principles of over/under. The development of hierarchical differentiation depends on conditions, e.g. written language, that makes possible form of social organisation, including work organisation, that transcend the principles of co-presence and co-locality. Today, almost everybody belongs to and lives in a social group - at least the majority of people are raised within a family. And also most people are members of one or more organisations, often work-organisations, where again they are part of a social unit. But the social groups and organisations are often ordered hierarchically according to power, privilege and prestige. As social science has long observed and as we are steadily reminded by Bourdieu among others, income, life courses, health, cultural taste, consumer taste, etc. are not alike for different people.

The third type of differentiation – the third step in Luhmann's evolutionary development of types of differentiation – is functional differentiation: that is into functionally specific subsystems such as economy, polity, juridical subsystem, religion, family, cultural subsystems, etc.. According to Luhmann there is no definitive final list of subsystems because new subsystems can develop, for example as in recent years the sport subsystem, the ecological subsystem and the IT-subsystem.

Observations of contemporary societies makes it, however, difficult to agree with Luhmann on the overall importance and predominance of functional differentiation. Although most commentators can agree on an evolution from predominance of segmentary differentiation to predominance of more modern types of differentiation, empirical evidence from contemporary societies show all three principles to be involved at the same time but with great variations from one society to another. Family formations and ethnic groupings are clear examples of segmentary differentiation which remain present in many societies today. At the same time possession of various forms of capital, economic, social, cultural and symbolic, as pointed out by Bourdieu, are clear indications of the importance of hierarchical differentiation.

We can agree with Luhmann that communications and actions in the functionally differentiated subsystems are coordinated by various symbolically effective media such as money in the economic subsystem, power in the political subsystem, law and rules in the juridical subsystem, faith in the religious subsystem, love in the subsystem of affinity, etc.; and, as a central point, that these codes are not translatable into each other. Each subsystem communicates within itself by means of its specific media.

But we can *also* agree with Bourdieu that within many (but not all) functionally differentiated subsystems there are struggles between the agents for the improvement of their respective positions; and that there in society as a whole are processes of distinction based on the agents' possession versus non-possession of economic and cultural capital.

So, while segmentary, hierarchical and functional differentiation on the one hand are leading principles of differentiation that have developed in some form of evolutionary succession, on the other hand when one looks at present societies one finds empirical evidence for the co-existence of all three principles at the same time. In most societies, segmentary differentiation, although still relevant, plays a less important role today than previously. But it is hard to find conclusive empirical evidence for Luhmann's general postulate that functional differentiation is now the primary or leading type of differentiation.

Central in Luhmann's understanding of systems of the functionally differentiated society is the absence of an overall societal force which keeps the subsystems together. The

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subsystems are 'structurally linked' to each other but there is no 'Durkhemian common ethic' or set of 'Parsonian cultural values' to secure the coherence of the society.

What in particular, however, makes the notion of segmentary, hierarchical and functionally differentiated society so 'attractive' for analyses of inclusion and exclusion is its almost perfect correspondence with the phenomenon that people do not any more belong to only one or two sub-systems (the family and the work subsystem) but that most people, today, are included within many different subsystems; not only over the course of their life time but also at any given point of time; a fact which makes this understanding of 'inclusion' and 'exclusion' dynamic. To this matter we shall return below when dealing with the micro level issue of individuals' and groups' integration into society.

Once again, and to sum up a most important conclusion from this discussion of different conceptions of differentiation, it should be clear that no matter whether one puts most emphasis on functional differentiation or on hierarchies or classes or any other type of overall differentiation in society, the concepts of integration, whether theoretical or applied, should always be analysed in relation to specified segments, specifies hierarchies, specified functionally differentiated systems.

Different notions of integration

We have argued that the first theoretical step should be to clarify the types of differentiations to be examined. When this step is taken, for example in the form of the combination of functional differentiation and unequal distribution of hierarchical power presented above - while at the same time recognizing the existence of residual traits of segmentary differentiation - the next step will be to choose among the large number of concepts of integration.

When making that choice it is central to distinguish between integration in the macro sociological sense and integration understood as individuals' and groups' inclusion into societal subsystems. Another central point is that it is in the latter connection that the concepts of exclusion and marginalisation seem to be most fruitfully applicable.

David Lockwood's article of 1964 in many ways sets the scene for the debate on integration and disintegration that was to come over the next decades. When Lockwood and those who followed him - e.g. Habermas, Rex and Mouzelis - talk about system integration and social integration, they clearly do not use the term integration to denote the involvement or attachment of individuals or groups of individuals to functionally differentiated systems, cultural life worlds or collective movements. They are concerned here rather with structures and actors at the macro level. System integration, according to Lockwood, is then conceived as involving more or less compatible relationships between different parts or subsystems in the society at large, while social integration is seen as involving more or less orderly (as opposed to conflicting) relations between collective actors of a social system.

In Mouzelis' elaboration on Lockwood's work, social integration focuses on collective actors. Here institutions are at the periphery while actors are at the centre - in the sense that rules are seen in connection with the complex methodologies the actors employ for the purpose of applying (or managing not to apply) these rules when playing specific games. From a system integration point of view, however, the main concern is no longer how such rules are actually applied by actors in specific interactional situations, but their relevance or

irrelevance to a social system's functioning and its basic conditions of existence.

Habermas has taken up Lockwood's concepts and linked them to his own famous concepts of system world and life world. The result is a conception of social integration that differs from Lockwood's: Habermas sees social integration as a matter of the unhindered working of the communicative reproduction of the life world - or more precisely - the reproduction of the life world's ability to secure cultural meanings, solidaristic social norms and personal identities.

In Habermas' latest works, integration becomes more blurred around the borderline between micro and macro, and now denotes at one and the same time the specific kind of communication that takes place in a certain part of society and the basis on which individuals or groups participate in a given part: social integration works on the basis of identity. In a coalition of social integration people in crucial ways identify with each other and with the community they see themselves as a part of. Mutual understanding is possible, because one can assume that the other communication partners share the same implicit notions and conceptions as one self.

Habermas' notion of political integration works on the basis of a principle for communication that is both stronger and weaker than identity. The partners do not have to identify with each other, but they must accept each other's right to mean what they mean. In the sense of not demanding identification political integration is less demanding than social integration; but in requiring rational argumentation it is more demanding than social integration.

For system integration the requirements to the participants are much weaker than social and political integration. What is needed is the acceptance of some symbolically generalized media such as money, power, love, truth, etc.. The working of these media makes a very simplified mode of communication possible. It requires neither identification nor argumentation but just a mutual acceptance of use of the media. One can make business with total strangers and read scientific articles by persons that one neither likes nor knows.

In contrast to Lockwood and his tradition, Giddens pays explicit attention to the micro level, to face-to-face interaction and to the question of micro versus macro levels of analysis. Social integration means reciprocity between actors in contexts of co-presence. In the course of their daily activities individuals encounter each other in situated contexts of interaction - interaction with others who are co-present. System integration means reciprocity between actors or collectives across extended time-space. Giddens emphasizes the point that social and system integration are bound closely to each other: the routines of day-to-day life are fundamental to even the most elaborated forms of societal organisation. The merit of Giddens' definition of social and system integration is that dimensions of time and space are taken into explicit account. In consequence the discussion about integration opens up a question side-stepped by Lockwood and his tradition: how does it occur that actions can be coordinated or integrated over large spans of time and space where actors are not in direct interaction with each other?

In contrast to most others, Luhmann sees the notions of inclusion and exclusion as addressed to the question whether or not individuals have a role in one of the subsystems, while he reserves the concept of integration to denote loose or strong connections between individuals' inclusion and exclusion within the different subsystems.

From Lockwood, Mouzelis, Habermas, Giddens and Luhmann one could easily go on to catalogue many other and different meanings of integration. The literature referred to

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above should, however, be sufficient to illustrate the point that many different understandings of integration exist at the same time.

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As noted earlier, the first step in choosing between the many conceptions of integration must be to specify the type of differentiation in relation to which integration and disintegration are to be examined. On this score, our experience at CID[5] is that Lockwood's pair of concepts of system and social integration can be fruitfully applied when studying differentiation at the macro level.

This is so, for example, at the level of system analyses which focus on the degree of compatibility between different 'parts' of society, in respect the relationship between the economy and the polity. Here one recent and widespread diagnosis is that the market economy and the welfare state have increasingly become incompatible, because processes of global socio-economic restructuration undermine the premises of postwar welfare states so that the economy increasingly becomes disembedded from the other parts of society. Another, competing, diagnosis of the same tendency towards systemic disintegration is that it is caused by rational choices made by the poorest parts of the population, the social assistance claimants, who in response to welfare state benefit provision opt out of the labour market (the underclass and dependency point of view).

CID's positive experiences with the application of Lockwood's concept of system integration also include analyses of relations between societal 'institutions'. By way of example here, we would point to the highly compatible relations between the compulsory activation system, now widespread in Europe, which requires some kind of 'activities' in exchange for social benefits, on the one hand and on the other hand the perennial desire of employers for as large and as qualified an industrial reserve army as possible.

Our gains at CID from use of Lockwood's concepts also encompass the social (dis)integration dimension concerning the degree of compatibility between social actors. That is reflected in, for example, our studies of tensions and compatibilities in the relationships between the unemployed, marginalised persons and socially excluded groups on the one hand and the rest of the population on the other. Such analyses have in turn raised the issue of the preconditions for empowerment and/or greater social integration of the socially excluded. Further questions about the preconditions of change in the degree of social integration versus disintegration arise when one enquires into the consequences of riots on the part of socially excluded groups in possible alliance with other groups; or of 'revolt from above', as when tax-payers refuse to finance the growing number of socially excluded people.

Analyses of the relationships between system integration and social integration have proved equally relevant to CID's work. One example concern the balance and relationship between the political subsystem and the economic subsystem on the one hand, and the way actors address the problem of social exclusion on the other hand. Or we may point again to the relationship between systemic and growing labour market marginalisation and exclusion on the one hand, and subsequent threats to societal cohesion from below and/or from above on the other hand.

At the same time, however, CID's experience also points to problems with the

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[5] See for example Møller (1995) and Lind (1995).

application of Lockwood's concepts at individual and group level. It has increasingly become clear that Lockwood's concepts are not capable of handling individuals' and groups' degree of attachment or non-attachment, their inclusion within or exclusion from one or more functional subsystems, hierarchies or segments of society. Fortunately, however, there seems at the same time to be a growing understanding of the value for micro-level analysis of Luhmann's conception of functionally differentiated societies, when combined with recognition of hierarchical differentiation whether in the form of class division or otherwise[6].

Inclusion, marginalisation and exclusion of individuals and groups in relation to different subsystems

There is, as mentioned, no end to the number of subsystems in a functionally differentiated society. New subsystems emerge, for example the IT-subsystem; and inside the same subsystem, such as the educational subsystem, one can make an almost infinite amount of differentiation into sub-subsystems: primary school, secondary school, a large number of types of vocational training schemes, different types of university education, etc., etc.

Luhmann's conception of being included means to have a role in a subsystem from which one can communicate; without such a role one is excluded. The notion can be applied irrespective of who is to blame, whether the individual that is excluded or the excluding system or no one at all because the exclusion is voluntary and therefore wanted by the excluded individual. The merit of the term, inclusion and exclusion is that they are well suited to analyse the involvement or non-involvement, attachment or non-attachment of individuals or groups *vis a vis* different subsystems of society.

At any point of time in every individual's life trajectory he/she will be included in some of the subsystems and excluded from others. Furthermore, all will experience that the pattern of inclusions and exclusions will change during their life course: nearly all children, for example, will be included within a nuclear family but at the other end of the life cycle more than half of elderly North-Europeans live in one-person households. Middle-aged people are often included in the labour market while children and old people seldom are. This means that *the concepts of inclusion and exclusion are dynamic concepts* in the sense that most individuals during their life trajectory will move into and out of quite a few subsystems. None, however, will be neither included in all subsystems or, conversely excluded from them all at the same time.

Figure 1 illustrates the connection between inclusion, exclusion and marginalisation from a system-theoretical point of view. The term inclusion/exclusion presupposes a separation between system and environment, but a door is added that makes movements possible into and out of the system. This corresponds with many empirical observations and consequently a zone is defined on both sides of the borderline where one can speak about marginality. Since we deal with processes over time, marginalisation may be conceived as a process whereby people move or are pushed or pulled away into marginality and further into exclusion. Marginalisation is, however, also possible in the other direction; but in this case it is often conceived as a positive movement out of exclusion, into marginality and eventually maybe across the borderline into inclusion. There are, however, also processes which involve

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[6] Elm Larsen has recently published a comprehensive review (in Danish) about milestones in the last decade's debates on classes (or their non–existance) and other forms of differentiations in contemporary societies Larsen (2000).

movements of people directly from inclusion into exclusion without a stage of marginality, for example when elderly workers are fired over night with very little chance ever to find a new job.

Figure 1:
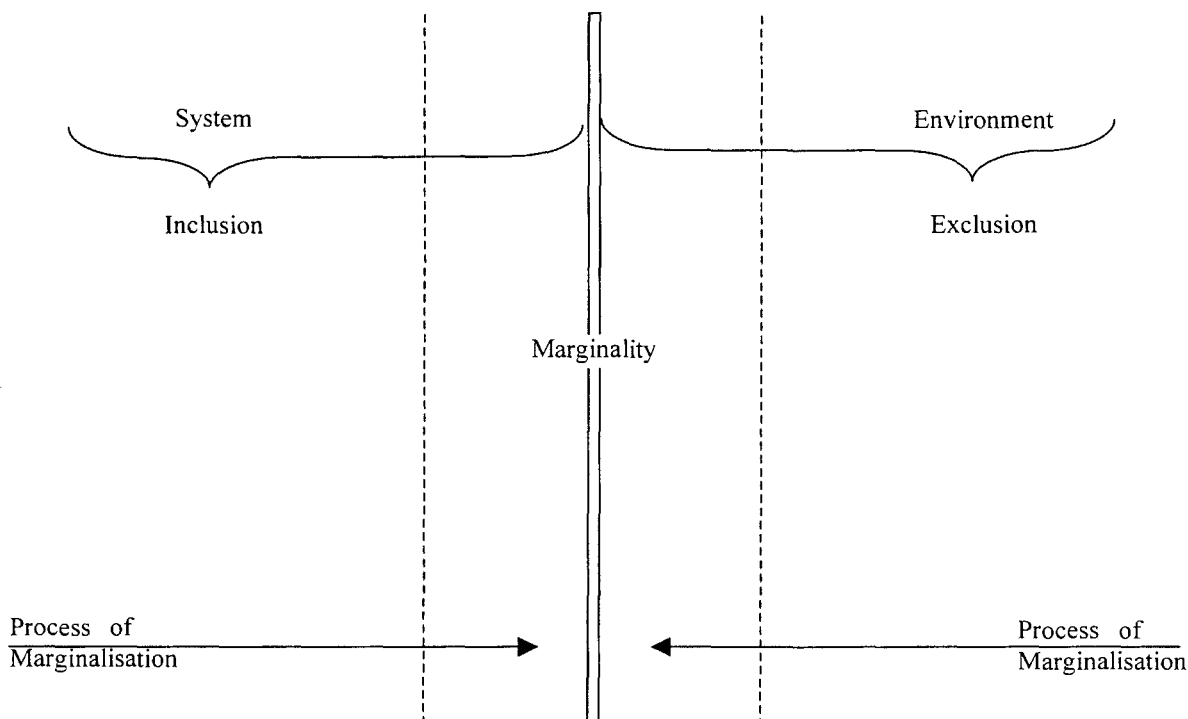
It is of central importance that inclusion, marginality and exclusion should be analysed *in relation a specific social system* (a segment, class or function-system) since the way of inclusion - the code for communication applied within each subsystem - differs from one subsystem to another. Communication and so inclusion by way of money in the economic subsystem is obviously quite different from communication by way of love in the subsystem of affinity and affection.

An analytical advantage to conceiving inclusion-marginality-exclusion as a continuum - and not, as Luhmann suggests, as a dichotomy between inclusion and exclusion - is that in many situations of 'real life' individuals are *more or less* included, *more or less* marginalised and *more or less* excluded. A sharp distinction between the three zones can not be set up because it is possible - for each of the large number of subsystems - to identify strong/weak positions within all three zones where individuals possess larger/smaller amounts of resources which allow them greater/smaller freedom of choice whether or not to maintain their present position. Consequently, it is more in accordance with empirical

observations *to conceive inclusion, marginality and exclusion as relative concepts:* you can be more or less included, more or less excluded and more or less marginalised.

Exactly where on the continuum inclusion-marginality-exclusion an individual is situated depends, to a high extent, on *his/her overall possession of and capacity to mobilize not only economic resources but also social, cultural and symbolic resources.* This typology corresponds with Bourdieu's fruitful distinction between different types of capital: economic capital in its various forms; social capital, which consists of resources based on connections and group membership, i.e. networks of social relations (kin and otherwise) to further one's goals; cultural capital gained by acquisition of socially valued knowledge, artistic taste, literary skills and suchlike; and symbolic capital, which entails the idea of honour and social prestige, i.e. the additional form the different types of capital take once they are perceived and recognised as legitimate.

Let us illustrate the relativity of positions within each of the three zones by some examples of inclusion/exclusion specifically from the subsystem of the paid labour market and the nuclear family subsystem. People possessing both an extensive network of social relations and such knowledge, skills and competencies as are strongly demanded in the paid labour market will, if they wish, always be included and strongly placed within the paid labour market; while persons with a weak network and little demanded qualifications will, if at all included within the paid labour market, have relatively weak positions there. In many countries there is a significant part of the labour force which during most of their life find only casual employment and consequently are positioned at the margin of the market; this although, there are also students and others with many more resources who, for shorter spells, have chosen a marginalised position. As for excluded persons, most of these have some (residual) but highly varying capacity to work. Among the excluded, those who have the highest residual work capacity in market terms are relatively best placed, and it is these who in some countries have been the particular target groups for policies towards 'activation'.

Today, rather many individuals in North Europe live in one-person households. Some of these individuals possess few resources and, one would expect, are often then involuntarily excluded from the nuclear-family-subsystem. Others, however, possess many resources but have chosen - at least for some time to come - to exclude themselves from the nuclear family; or they try more intermediate forms of cohabitation and consequently could be seen as marginalised *vis a vis* the nuclear-family-subsystem.

In our view, this way of conceiving inclusion, marginality and exclusion - as relative concepts related to each other and applied specifically to each of modernity's segmented, hierarchical and functionally differentiated almost unlimited number of subsystems, where the position of each individual within each subsystem is based on his/her possession of different types of capital - is superior to seeing inclusion, marginality and exclusion each as rather autonomous and relatively isolated phenomena.

Towards the end of the 1980s, it became generally assumed within the European Community that 'poverty' - in the Townsendian tradition of extreme class inequalities and lack of resources (Townsend 1979) - was no longer the right word and subsequently it was replaced by 'social exclusion' - a term intended to denote not just lack of material wealth, but a condition of deprivation in respect to wealth, social rights, attachment to the labour market and strength of informal networks in mutual interaction. Then followed an extensive debate about the distinctions between the two concepts. Some commentators (e.g. Abrahamsen 1998) claimed that distinctions could be found as to: the situation (lack of resources versus

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lack of rights); the causes (needs versus discrimination); the perspective (static versus dynamic); the societal type of differentiation (hierarchical into classes versus horizontal into insiders and outsiders); the remedies (social transfer payments versus activation measures); and finally the disciplinary approach (economics versus sociology). Other commentators, e.g. Sen (1998), argued that the idea of social exclusion was 'not a novel concept and does not make a conceptual breakthrough [....] The concept of social exclusion reinforces - rather than competes with - the understanding of poverty as capability deprivation by giving more focus to the relational routes through which deprivation may come about'.

Others in turn adopted more political interpretations and argued that poverty was no longer an acceptable concept for well developed welfare states; and as a by-product of this line of debate, the point was underscored that ...'to enunciate "problems", establish causalities, classify populations and prescribe solutions are inseparable moments of the same discourse'[...] to name groups is to draw social boundaries' (Silver 1996).

Each of the concepts, poverty and social exclusion, has its own internal logic and dynamic, determining which aspects of a phenomenon are highlighted. Different concepts privilege different points of possible insight, just as different concepts lead up to different discourses; so that some topics are kept out while others are brought into central focus. As Levitas (1996) notes, the exclusion-inclusion discourse can obscure the fact that the positions into which people are included through paid work are fundamentally unequal (as to class, gender and ethnicity).

Also the very best studies on marginalisation deal with the concept of marginalisation in relation to inclusion or to exclusion or to both. Park, for example, a pupil of Merton and the first to apply the concept of marginalisation (Park 1928), described many Jewish immigrants to U.S., whose situation he investigated, as living at the margin: they were neither totally integrated into the new north-American society nor had they maintained all their Jewish roots from the their society of origin. When studying the millions of people living at the margins of Latin American societies, Germani (1980) defined marginalised persons as those possessing both the desire and capacity to fulfil societal norms, e.g. as regarding work or education while lacking the objective opportunities (for jobs or schools). In a more recent study, Johannessen (1997) conceives labour market marginalisation as a process of movement from the kernel of the market via more and more precarious labour market positions towards the end where the individual is finally excluded.

As already alluded to, *integration/inclusion is not necessarily something good*, although it is this way of understanding which, often implicitly, dominates both the literature and the day-to-day use of the word. Rehearsing our logic that differentiation comes before integration/inclusion, the notion of labelling the concept 'good' or 'bad' ultimately depends on individuals' moral evaluations of the kind of differentiation studied (the parts, the subsystems, etc.). It is not good to be integrated/included into something bad, and if the subsystem studied, is regarded as repulsive it is better to stay excluded. Many liberalists want to stay out of the trade union movement and the federations of employers; some of the homeless and drug-addicts do not want to be included in every aspect of the 'normal' society or maybe not in most of them; and many peoples' moral evaluations make them decide not to be included within the religious subsystem, the political subsystem, the sport subsystem, the nuclear family subsystem, etc.. If we return for a moment to Mouzelis' delineation of four very different modes of integrating ethnic minorities, his moral preferences clearly point in the direction of the type of inclusion he labelled 'the two way bridged communicative integration'

which encompasses mutual respect of the autonomy and internal logic of the various cultural traditions.

Another moral aspect arises with the question about *who is to blame for the lack of wanted integration/inclusion?* Who has the responsibility? The concepts of inclusion and exclusion as developed and understood by Luhmann coined no initial implications concerning who is to blame, the individual that is excluded or the excluding system. But as a growing number of EU-citizens became unemployed or marginalised in relation to the labour market, the issue of responsibility came to the fore; and there is not much doubt that since the end of 1970s, after some years with economic crisis, focus on who was to blame shifted in most European countries from emphasis on society to emphasis on the unemployed themselves (Lind 1995). This shift has been exacerbated with the emergence of activation policies across Europe, in connection with which not only liberals and conservatives but also labour politicians have increasingly talked about excluded persons' responsibilities for their own lives and blamed them for their alleged lack of willingness to be activated. Having said that the question of who is to blame is a central normative issue, there is then another, related and equally central issue. This is the question of how far those who have set this agenda to shift more responsibility on to the unemployed themselves are aware of the strong likelihood that their own moralising will in turn serve to exclude the excluded still further.

If one considers the many ways society can be differentiated, the many ways of differentiating the subsystems and of combining the divisions and subdivisions with varying degrees of inclusion, marginalisation and exclusion, the result is an overwhelming number of conceivable combinations. So, at the outset one has to accept that the almost infinite number of combinations may well lead to many competing and even contradictory analyses of inclusion/exclusion in modern societies.

It then makes sense, of course, to try to pare down the frame of reference. One way to limit the complexity is to identify those *subsystems which are the most important for people.* It is, for example, hard to imagine that adults in most societies could be totally excluded from the economic subsystem over longer periods of time and so have no access at all to buying on the market. After all, unemployed and homeless people must find ways to prevent themselves from starving to death. So, inclusion into the subsystem of paid work or other formal or informal income creating activities is generally recognised to have a high priority. The significance of this type of inclusion stands out at least in Western societies where paid work generates not only income but often also new networks, more status, more self confidence and more recognition of doing something useful for society, and even sometimes implies intrinsically meaningful activities and enhanced social relations.

There is some ambivalence about the centrality of the nuclear family subsystem. It remains relatively important in Southern Europe but has been declining there, while it has seen some re-vitalisation in Northern Europe over the past decade or so. There are in any case many people who prefer, for shorter or longer periods of time, to live their life outside a nuclear family framework. As for the educational subsystem, on the other hand, there is a great deal of evidence to underline the growing salience of education for the well functioning of individuals. It is often argued that education is an increasingly important precondition for a strong position in the paid labour market, in the income subsystem, in the cultural subsystem, in the leisure system and in the social network system.

So, one subsystem can be more important than others, either because - as with the income system - it is (almost) impossible to survive without some degree of inclusion; or

because inclusion/exclusion in/from one specific subsystem often leads to inclusion/exclusion in or from other subsystems as well. Mortensen argues, for example, that there is much research evidence to show how the subsystems of paid labour, nuclear family formation and education come together to cumulative negative effect in processes of marginalisation and exclusion (Mortensen 2000).

More generally, it becomes a very central question *how far one can predict a person's positions within other subsystems from his/her position within one specific subsystem*; or formulated in another way: how far are there vicious circles and virtuous circles? As is well known, Matthew says that: 'Whoever has will be given more...Whoever does not have, even what he has will be taken from him.' (St. Matthew's Gospel 13:12).

According to Luhmann, however, exclusion and marginality are characterised by vicious circles while inclusion is not characterised by virtuous circles: inclusion into one subsystem is seldom linked to inclusion into other systems, while exclusion from one subsystem probably involves exclusion from other systems. The argumentation is that when one is included into a subsystem there is only a weak if any correlation between positions in the various subsystems. Each subsystem has its own specific way of communication and its own mode of inclusion. Whether you are married or not has not much to do with your political activity, your role in the economic system, in the religious system, etc. On the other hand, Luhmann claims, if you are excluded from one subsystem there is a tendency to be excluded also from other subsystems.

At the end of the day, however, it is an empirical question how far Luhmann's 'half Matthew-principle' mirrors contemporary society. For a start we can take the statistically very comprehensive Nordic level of living studies undertaken in each of the four countries during the last two-three decades. These show that people with the highest education also often have a higher income, are more politically active, read more and more frequently attend cultural events, than those poorly educated. A closer look at such indicators of the 'full Matthew principle' reveals, however, that they overwhelmingly stem from 'hard' and economic-related subsystems, whereas information is either thin or absent about the 'softer' subsystems e.g. friendships, networks of support and intimacy or around environmental issues.

Analyses of data from the Nordic surveys also reveal that although high (low) education is often positively (negatively) associated with income, housing, work, holidays, political activity, cultural activities, etc., it is *very seldom the same persons* who have strong (weak) positions within all or almost all subsystems. Similar results were recently found in a Danish study (Hansen 2000), where the positions of randomly selected employed, unemployed and activated persons were observed in four subsystems: the economic, the political, the subsystem of social networks and the leisure subsystem. While the concrete measurement of inclusion/exclusion is always debatable, these data show that only around 5 per cent of the people within all groups were included in all four subsystems and less than 5 per cent were excluded from three of the subsystems.

To conclude, there seem then, at least in the Nordic countries, to be some *mechanisms of compensation* which prevent those who are excluded - even from the most central subsystems of paid work and income - from also being generally excluded from most other subsystems as well. At the same time there also seem to be *mechanisms or barriers,* that hold back any more than just a few individuals from inclusion in all or in almost all subsystems at the same time.

So far, however, very little research has been done about the processes by which

people move into virtuous circles and vicious circles. Future investigations may also very well show differences from one European country to another. For example, a recent Portuguese study suggests the operation there of a 'half Matthew principle' of vicious circles (Hespanha & Matos 2000).

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