Considerations on marginalization, marginality, economic marginality and social exclusion

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Resumen
En los estudios sobre exclusión social se encuentran menciones recurrentes a que el concepto es vago, es impreciso. Sobre la base de la teoría de la significación de Mario Bunge se indaga en las raíces metodológicas de la vaguedad. El análisis lleva a concluir que la referida imprecisión se erige a partir de la carencia de sentido ya que el concepto de exclusión social no suele estar inserto en una teoría. En concordancia con esta conclusión metodológica el interés se vuelca hacia el campo conceptual. Se hace un análisis comparativo de dos versiones del concepto marginalidad —marginalidad cultural y marginalidad económica— y la noción ‘exclusión social’. El análisis lleva a mostrar, tomando en cuenta el contexto histórico social que los originó, el estrecho paralelismo entre ‘exclusión social’ y ‘marginalidad económica’.

Palabras clave: marginación, marginalidad, pobreza, exclusión social.

Abstract
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In the studies on social exclusion there are recurring references to the fact that the concept is vague, imprecise. About the base of the Mario Bunge’s signification theory it is inquired about the methodological bases of vagueness. The analysis leads to the conclusion that the mentioned imprecision emerges from the lack of sense since the concept of social exclusion is not usually inserted in a theory. In agreement to this methodological conclusion the interest turns to the conceptual field. A comparative analysis of two versions of marginalization —cultural marginality and economic marginality— and the “social exclusion” notion was performed. The analysis shows, taking into account the social historic context that originated them, the narrow parallelism between “social exclusion” and “economic marginality”.

Key words: marginalization, marginality, poverty, social exclusion.

Introduction
From the signification theory of Mario Bunge, this work presents a methodological analysis of the concepts marginality, economic marginality, marginalization and social exclusion. They are developed by an analysis...
that compares the marginalization concept with the two marginality variants. It is investigated about the origins of the social exclusion, and it is recorded about the wide agreement in the bibliography that it is a vague notion, and it is subject to the methodological scrutiny with the double objective of understanding where its lack of conceptual precision is and what kind of concept it is. Also, a revision of the study's main conclusions is made, focusing on the links between social exclusion, marginality and economic marginality.

**Methodological tools**

The methodological analysis presented in the following sections is performed from the signification theory of Mario Bunge (1999: 77-89). In this section the basic elements — necessary for the understanding of the presented arguments — of the conceptual tool the study is made with are briefly explained.

The base of the rational discourse are the concepts, these must be understood as the significance units. They are used to form propositions or sentences. The propositions say something about the objects, something that can be an asseveration or a negation.¹ The concepts this way defined, to the extent that they do not affirm or deny, cannot be true or false, they can only be exact or vague, applicable or inapplicable, fructiferous or sterile (Bunge, 1999: 77-78). The predicates can be unitary as "work", binary as "is related", tertiary as "it is interposed", quaternary as "interchanges", etc (Bunge, 1999: 79). A unitary predicate denotes the property of the individual (simple or complex), for example the X individual belongs to the group of the marginalized, where the individual can be a person, a production social relation or a geographical entity.

According to the previous ideas, the centre of this study should be the methodological analysis of the propositions of which the marginalization, marginality, economic marginality and exclusion are part of. However, in the social sciences this precision is not usually considered and introduced it now could bring difficulties in the understanding of the arguments exposed in this work, for this consideration it was chosen to keep the disciplinary tradition.²

One of the important properties of the propositions is the kind of referent that is defined as the collection of the predicate's objects (Bunge, 1999: 82). For

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¹ In general, a proposition is the result of attributing a predicate (M) to the individual X: X belongs to the marginalized group M(X). The predicates are attributed to pair, terns, etc, and can be interpreted as a function of individuals to propositions (Bunge, 1999: 81).

² This decision is the equivalent, in the case of this study, to compare the concepts to unitary sentences.
example, marginality predicates about individuals, marginalization about geographic entities and economic marginalization about production social relations.

Besides, every predicate determines a kind called extension of the predicate, that is the collection of individuals (pairs, terns, etc.) that present a property that predicate designs (Bunge, 1999: 81).\(^3\) The extension of is a set and as such can be subject to all kinds of logic operations (union, intersection, disjunction, conjunction, etc.).

Another important methodological concept for the development of this work is the sense; in words Mario Burge. "The full sense of a proposition is the group of propositions that implies it, or that it implies — this is, the union of its login ascendance and descendent" (Bunge, 1999: 88).

The meaning of a proposition is defined as its reference or connotation together with its sense or denotation. Moreover, the theory stipulates that every construct has a meaning, this is, a referential class and a sense although only part of it is known (Bunge, 1999: 89).

Bunge's significance theory differs from that of the old logic empirism and neopositivism — denominated meaning verificationalist theory — that sustained that "the meaning of a proposition consists on its verification method" (Ayer, 1965: 18; Bunge, 1999: 98). The difference between both theories is clear when one reflects on the following sentence — used by Bunge —. "The soul survives the body", this proposition has full meaning within a theological context — it has a kind of reference and within the theological theory as ascending and descending sentences —, although it is not ascertainable.

**Marginalization, marginality and economic marginality**

In this section the methodological theory will be used, briefly exposed in the previous section, to elucidate the marginalization, marginality and economic marginality concepts; the exclusion concept will be seen in the following section.

The concept of marginalization used by the National Population Council (Conapo), whose main function is to help in "the definition of strategies and social policies" (Conapo, 1998: 17) allows giving count of the structural phenomenon that emerges from the difficulty to propagate the technical progress in the group of the productive sectors, and socially is expressed as persistent inequity in the

\(^3\) For example, the marginalization of the geographical entities has as an extension the set of geographical entities that are marginalized, in symbols $E(F) = \{XeA/MX\}$. 

participation of the citizens and social groups in the development process and in the enjoyment of its benefits (Conapo, 1998: 17).

This concept is objective in the localities and municipalities through the dimensions: education, dwelling and monetary incomes, whereas that for the state level the population dispersion is added. The exposition, from now on, pays special attention to marginalization of the localities.

Once the dimensions are defined, the percentage of illiterate population is used as education indicator; the particular dwelling percentages without piped water, of dwellings without drainage, particular dwellings without electricity, the dwellings with dirt floor and the average of occupants per room, as dwelling indicators (Conapo and Progresa, 1998: 26). Due to the fact that the recount of 1995 did not include information about monetary incomes per locality, it was opted to use as proxy variable the percentage of the population occupied in the primary sector.

The following step consists on use the indicators to present the socioeconomic marginalization of the localities, understanding marginalization as the lack of access of goods and basic services (Conapo and Progresa, 1998: 17). Then the problem is reduced to summarizing the information provided by the seven indicators (or seven variables) into one single measurement that reflects the degree of marginalization of the localities in the country.

The statistics and methodology of the social sciences provide a series of methods that allow synthesizing indicators into indexes. Conapo used the factorial analysis and as a result obtained a weighted adding index, where the weights are the elements of the characterized vector associated to the higher latent root of the intercorrelations matrix. (Conapo and Progresa, 1998: 55).

With the coefficients or weights of each variable the value of each marginalization index is estimated for each locality and then is proceed to built the stratum using form this a stratification statistic technique (Conapo and Progresa, 1998: 57). The application of these statistic procedures allowed the identification of five marginalization stratum: very low, low, medium, high, and very high (Conapo and Progresa, 1998: 58).

In brief, marginalization in its most abstract version tries to give count of the differential access of the population to the enjoyment of the development benefits. The measurement is focused in the lacks of the localities population in the access to goods and basic services, captured in three dimensions: education, dwelling and income.

\[4 \text{ Or of the variants and covariants matrix of the seven indicators}\]
It should be noticed that marginalization is a phenomenon that affects the localities and not necessarily the people who live in these. Indeed, a locality can be of high marginalization, but some of its inhabitants may be literate, living in dwellings with piped water, electricity, firm floor, low levels of stacking and earning enough not to be considered at the margin of development.

The Conapo's marginalization index is a valuable instrument to direct the public policy, since the data base, of public domain, includes besides the seven indicators, variables that allow situating in the country's map the localities according their marginalization degrees.

On the other hand, marginality is a concept that is situated within the modernization theory, according which the "underdeveloped" societies would be characterized by the coexistence of a traditional segment and another modern, being the former the main obstacle to reach the self-sustained economic and social growth. The notion of "marginal", in its most abstract conception, remits geographically to the zones where the norms have not penetrated, nor have the values or forms of being of the modern men. It is then about the past societies vestiges that conform marginal personalities to the modernity (Germani, 1962).

From this theory came the idea that if the Latin American countries were looking coming out from underdevelopment they must have to make their population modern. This was the task that was undertaken at the beginning of the 1960's, soon after the Cuban Revolution victory, by the research and social action centre social development for Latin America (Desal), located in Santiago de Chile, headed by the Jesuit priest Roger Vekemans.

However, the conceptualizations and actions of Desal were reduced only to the urban marginal, probably as a response to the disruption that carried the intense rural urban migrations of the time in the predominant way of life in the main cities of the Latin American countries.

Desal distinguished five dimension of the marginality concept (Desal, 1965; Desal, 1969; Cabezas, 1969; Vekemans, 1970), all of them referred to people, individuals, not to localities, municipalities or states:

1. The ecologic dimension. The marginal people tend to live in dwellings located in "misery rings", in deteriorated dwellings within the city and state or private planned neighborhoods.

2. The sociopsychological dimension. The marginal people do not have the capacity to act: simply populate the place, they just are, nothing more. Marginality means lack of participation of the social benefits and resources, in the network of social decisions, their groups lack internal integration; the marginal man cannot
overcome his condition by himself. Marginality is a problem that corrodes the marrow of the man's potential for voluntary and rational self-betterment.

3. The sociocultural dimension. The marginal people present low levels of live, health and dwelling, as well as low educational and cultural levels.

4. The economic dimension. The marginal people can be considered as sub-proletarian because they have unstable subsistence incomes and employments.

5. The political dimension. The marginal people do not participate; they do not have political organizations to represent them, and they do not take part of the tasks and responsibilities that have to be undertaken for the solution of social problems, included their own (Giusti, 1973).

To the desalian marginality was opposed to the economic marginality theory detached from the Marxism in its dependentist version. This is not the place to detail the discussion sustained by the adherents of one or other marginality concept, or the prickly argument proposed within the time's Marxism lines. It is enough to say that the marginal concept made reference to the place the production social relations in respect to the accumulation model; these could be central or marginal. The belonging to one or the other category is not independent of the history passing, since it depends on the development stadium or the degree of advancement of the capitalist social relationships (Quijano, 1969 and 1977).

The theoretical discussion, which had several repercussions, was focused on the conceptual localization of the marginal mass: or it was an expression of the reserve industrial army and as such it played a functional role of lowering the salary rate (Cardoso, 1970), or it was relative exceeding population, this is, part of the population that were extra and that did not make pressure on the salaries reduction (Nun, 1960).

This marginality concept, which could be qualified as economic, has a referent the production social relations and not the individuals, as the desalian concept. The differences if not a minor one, to the extent that the latter catalogues as marginal all those people who are at the margin of culture, economy, psychology and politics, besides of living in marginal ecologic contexts and therefore their inclusion or de-marginalization requires a titanic effort that is extended from transforming mentalities to the social and individual ways of behavior. On the other hand, from the Marxist concept comes out that a subject is marginal for being in an economic activity marginal to the capital accumulation, and in consequence could stop being one when inserting to a central production social relation. It is clear that in crises times — that have been too many and
recurrent in the societies of Latin America — the transit from peripheral to central activities, formidable obstacles must be overcome.

**Social exclusion**

In the decade of 1960, in France, the marginalization term was coined to refer to those individuals who were not integrated to the richness production and social recognition networks (Massé, 1965; Lenoir, 1974). The extension of this concept applies to the "court of miracles", this is, the group of people formed by beggars, vagabonds, prostitutes, criminals, rascals, scoundrels, jugglers, comedians, etc. (Geremek, 1991). But marginalization is not the exclusion, as Robert Castel says:

To give the minimum rigor to this term we have to take into account the ritualized concepts that mark exclusion. These are very different, but remit to a judgment pronounced by an official instance, supporting in regulations and mobilizing constituted bodies (Castel, 1998: 127).

The concept reappears in the decade of 1990, when Europe in general and France in particular move towards a new economic model, adopting measures of structural change. In fact, the hypothesis proposed by Castel is that the change was expressed in a fundamental modification in the promotion concept — inclusion — of the salaried people that had taken place between the Second World War and the decade of 1980: a) precarization and individualization of the work process; b) inequities before the transformation of the work relations — ; c) predomination of the work's uncertainty over the reduction of the inequities, inequity is not longer talked about, although this is accentuated (Castel, 1998: 149-55).

On the base of these three trends that tend to polarize society, Castel describes the destabilization process of the stable employments, especially a part of the old classic working class, an installation in the precariousness of small jobs with unemployment periods and social assistance that affects especially the young people, as well as reappearance of a sector of the population that could be qualified as supernumerary (Castel, 1998: 157).

In the facts, the exclusion concept tries to describe the process through which a series of social actors that had been included in the products of the development and welfare in the economic bonanza, emergency and consolidation years of the benefactor State are excluded — especially by the labor market — due to the changes induced directly or indirectly by globalization.
In order to think of the situation of the Latin American countries from the social exclusion point of view, it is enriched by adding the social rights ingredient. Minujin sustains that "the social inclusion is explicitly referred to have the real possibility of accessing the social rights" (Minujin, 1998: 171). After recognizing that the vagueness of the exclusion concept has led to applying it to different situations making it lose its specificity (Minujin, 1998: 173), proposes prioritize three of the social inclusion/exclusion concept facets that are directly related to the social rights: a) the politic, that is related to formal citizenship and with the citizens' participation, b) the economic, that refers to employment and social protection and c) the social, that can by synthesized in the access to the social capital (Minujin, 1998: 176-187).

The social exclusion category does not seem to have a reference class clearly established, indeed, sometimes it refers to individuals; in others, to work processes, and sometimes, to work relations. In consequence, it is not possible to define unequivocally its extension. On the other hand, its sense is not clear either since to the extent that is a descriptive category that is not inserted within a theory, it is not possible to identify the preceding sentences, even when it is possible to derive from it a series of propositions.

**Conclusion**

Although the four concepts that have been object of this study present several differences, next are highlighted only those that are considered as relevant from the methodological point of view.

In the first place, the meaning of the marginality concept, in the desalian version, is perfectly determined within the modernization theory, this is one of the various theories in vogue at the time, that had as main purpose to reveal the determinants of the economic development. Indeed, its kind of reference is the people and its sense is determined by the precedent and consequent sentences in the logical structure of the modernization theory.

In the sense to the economic marginality concept is the Marxist theory, in particular what it says about the role of work in the capitalist production process (Marx, 1975: 782-890) — despite that there were some problems about its correct interpretation, that even today have not been solved — and its kind of

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5 The descriptive concepts belong to the class of non-formal concepts - that allow giving count of the world and plan our research of it; they are presented in descriptive contexts whereas the interpretative ones dominate theoretical contexts (Bunge, 1979: 110).
reference are the production social relations, in consequence, its meaning is defined.

About the marginalization concept gives count of the way the development products are rooted in the space and represents "a structural phenomenon that is originated in the modality, style, or development pattern" (Conapo, 1998: 17). Its kind of reference are social aggregates such as localities, municipalities or federative entities, but it would seem that it does not have full sense since it is not evident that takes part of a implicitly proposed theory and therefore, is not product of sentences that imply it and, at the same time, its consequents are not clear.

The meaning of the social exclusion is vague because its referent is not precise; apart that its sense is not well specified as it is a concept that is not inserted in a tread of theoretical relationships.

In the second place, the four concepts differ in extension. Even that the marginalization's kind of reference is the geographical units to which it is applied, its extension or dominion is the group of geographical units with a degree of pre-established marginalization. The group of demographic demarcations ranked according to marginalization degrees allows classifying the population that live in those environment, then, indirectly, this concept comprehends all the population that live in marginal zones.

The kind of reference of marginality, in its desalian version, is the people, and its extension is the group formed by the marginal individuals, even more, in the facts and for several tactical-political reasons, it was reduced to marginal inhabitants of urban zones.

The social production relations are the kind of reference of the economic marginality and therefore, its extension is the group of social production relations marginal to the accumulation model. Based on such group it could be inferred that the marginal population, according to this conceptualization, it would be the people who are inserted in social production relations not centered in the capital accumulation. From that it is noticed that the two theories of marginality organize differently the observation, so that the same person could be classified differently by one or the other theory.

People, processes or work relations are the kind of reference of the social exclusion, but the extension is reduced to those individuals who have been excluded. This kind of concept — that compares the notion of marginality — has a problem, that the classification criteria are ambiguous; for example, it is worth asking, in how many prioritary dimensions should one be excluded from to be
considered as a social excluded? Would one be enough, two, or it has to be from all of them, politic, economic and social?

In the third place, the marginalization refers to social aggregates spatially located, in states, municipalities or localities, whereas marginality preaches about individuals. This is an especially delicate point since it is frequent that the read of the marginalization data incurs in ecologic fallacy (King, 1997): a logic mistake is made when attributing the characteristics of the aggregates as they are, for example, the localities, the individuals who inhabit there. As it has already mentioned, not all the people who live in a high marginalized area are marginal, when they are judged by their insertion in the productive system or in function of the five dimension of the desalian marginality.

Confusing marginalization with marginality in any of their two versions implies: a) considering the same concepts with different theoretical roots, that organize differently the same group of facts, and b) mix the empirical referents committing the ecologic fallacy.

In fourth and last place we have to mention that the desalian marginality and the economic marginality have clear connections with the social exclusion.

To begin with, it could be considered that the social exclusion could be seen as a particular case of the desalian marginality. Indeed, the political, economical and social dimensions, considered by Minujin as priority in the social exclusion, are three of the five dimension of the desalian marginality. But the discourse of the latter is proposed from the social rights point of view, which opens a way to invert the process through the social and political participation as means for demanding its compliance, whereas marginality is of a structural character, built over the base of the sustained progress, where the incorporation of the marginal people would be through the modernization process: the disappearance of the traditional society for the advance of the modern one. An idea that derives from this theory, in comparison of the social exclusion, is the civil conformism: it would be enough to wait that the development process advances to live better times, and in the short term, centers its action in the modernization of the marginal man mentality. Another difference between the two concepts is the way in which they include the social dimension: the marginality theory recurs to the notion of the social network (Lommitz, 1975) whereas the exclusion uses the social capital concept.

José Nun (2000) sustains that, in the decade of 1990, the European concept of social exclusion finds again the subjects we presented in Latin America in the decade of 1960. It is interesting proving, however, to what extent some of our
formulations of then now reappear almost unaltered. For example, Julián Freund (1993) observes that the notion of excluded is "saturated of sense, no sense and contra sense" and practically it can be asked to say what one wants. Even more, Ralf Dahrendorf (1994) refers to the underclass (another vogue term) as: "forgiving the language, they are not needed. The rest can live without them, and would like to" (Nun, 2000: 31).

In the cite it is mentioned, beside the cruelty or lack of sense that characterizes the social exclusion, that the subjects referred to are the same the economic marginality faced in Latin America, in the context of the dependence theory.

When putting together Nun's idea with the methodological analysis it is reached to a conclusion that if the economic marginality concept were used instead of the one of social exclusion, it could be accounted for the processes observed in the labor markets in Europe in the decade of 1990, as well as those lived in Latin America since the 80's, but it has to be noticed that there are specifications.

In the former ones, the exclusion is observed (in the 90's) after 30 years of sustained economic growth, low inoccupation rates, stable employments, good salaries and the protection that the welfare states provided (Nun, 2001: 29). The economic and social transformations and the advancement of globalization produce some precarization in the decade of 1990 (performance of temporal jobs followed by unemployment and the reappearance of a supernumerary population profile) and individualization (multiplication of collective work contracts, division of collective negotiation, tendency towards the individualization of the salary relation), inequities (in the unemployment risks, status and remuneration) before the transformation of the work relations (labour flexibility, both internal and external) (Castel, 1998: 149-158). The population that is left at the edge of development is excluded because at a certain time it was included. In Europe, exclusion is followed by inclusion.6

On the contrary, in Latin America even today there are sectors of the population that have never been included or excluded; they are inserted in precapitalist social production relations — economic marginal —, relations that according to the dependence theory would be destroyed by the advance of capitalism. However, they have survived to the scarce dynamism of the capitalist economy that has not destroyed the old social production relations.

6 The characters of the previously described "miracle court" are not considered here.
On the other hand, the insertion of Latin America in globalization and the structural change processes have provoked the disappearance of paradigmatic capitalist forms of the importation substitution model; the workers who were included enjoyed relatively stable employments with decent remunerations, covered by social security, keeping the distance; this is the part of the population who experiences a similar process to that live the European salaried people: the then included now excluded become part of the informality, unemployment when they perform precarious jobs, etc.  

So, the analysis of the social marginalization phenomena occurred in our countries which started in the 1982 oil crisis, followed by the stabilization and adjustment and structural change processes — in the framework of the Washington Consensus — can be examined using the social exclusion category, recognizing that it was coined to reflect the changes in the European labour market, with all the imprecision charge that characterized it, or, to go to our old theoretical sources and rescue the economic marginality perspective inscribe within the dependence theory. However, these are not the only two theoretical options; another possibility would consist on trying to precise the vague notion of social exclusion, inserting it within other theoretical schemes available, as for example the Arthur Lewis (1960) theory, but not the most known version of closed economy, but the one of open economy, or, to use theories that allow understanding the effects of the structural change policies over poverty, income distribution inequity, the functioning of the labor market in underdeveloped countries, etc. (Cornia, 2004).

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It is necessary to precise that the reference is made to a structural characteristic of the production and labor market, not to concrete people. Let us suppose that the number of work positions is reduced in a country because the textile industry succumbs before the competence of foreign products, sold in the internal market at lower prices by foreign companies. If other positions are not created, workers would thicken the lines of rummage economy. Given that other new generation activities would appear, the work positions possibly would require qualification that the textile workers do not have. Some would be recycled, some other would not, this would depend on a series of contextual and factors that would be necessary to study.
Considerations on marginalization, marginality, economic...

