

## THEORETICAL AND METHODOLOGICAL APPROACHES TO THE PROBLEM OF SOCIAL INCLUSION

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### Abstract

The article analyzes the theoretical and methodological foundations of the problem of social inclusion. First and foremost, the essence of social inclusion as a specific problem is clarified. It is described as a mechanism for overcoming phenomena such as social exclusion and alienation. The study concludes that while the essence of social inclusion is recognized, it remains a subject of ongoing debate within sociological science. The author analyzes the theoretical perspectives on social exclusion upon which social inclusion is predicated, identifies risk groups susceptible to social exclusion and determines the primary indicators of exclusion. By synthesizing major theoretical approaches to social inclusion, the author provides a generalized definition and establishes its core principles. Furthermore, mechanisms for ensuring the social inclusion of various social groups are elucidated.

### Keywords

*Social exclusion, social integration, social inclusion, vulnerable groups.*

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## 1. Introduction

Generally, interest in the study of the concept of social inclusion in sociological science is linked to the emergence of the problem of social exclusion. Currently, the most widely accepted explanation of social exclusion is found in European Union documents: social exclusion is described as a process in which certain population groups or individuals, for various reasons, are unable to participate fully in social life. The causes of this exclusion include poverty, lack of basic knowledge and opportunities, language barriers, discrimination and racism, lack of sufficient activity, disability and physical limitations (Chubarova, 2022).

The first systematic studies on the problem of social exclusion and its causes were conducted by the French sociologist É. Durkheim. His concept of social solidarity answers questions regarding the exclusion of individuals and various social groups within society in its own unique way. He believes that the main cause of marginalization and exclusion of population groups is the lack of social solidarity (Grigoriev, 2020).

In explaining the essence of social exclusion, the approaches of K. Marx, Erich Fromm and Max Weber (Isfandiyarov, 2011) are of particular interest. These approaches form a series in that, practically, both Fromm's and Weber's approaches rely on K. Marx in linking social exclusion to the shortcomings of the capitalist system. According to Marx, due to the competition and isolation created by the capitalist class, people become alienated from one another. Communication between individuals turns into market relations and manifests in the form of commodity exchange (Gasper, 2010).

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## 2. Development

Fromm describes how industrialization affects the formation of a sense of exclusion and meaninglessness in people. In his view, the main cause of the sense of exclusion and isolation formed in modern society is the weakening of social ties. This, in turn, occurs under the influence of market relations (Kravchenko, 2018).

The problem of social exclusion holds a special place in A. Giddens' research on social structures. Giddens calls social exclusion "disconnection" (Giddens, 1997). According to Giddens' definition, "social exclusion refers to cases where people are marginalized from the life of society. People in a state of social exclusion are deprived of the opportunities to escape their situation due to poor living conditions, poor quality education and schools, limited mobility, etc. A large part of society is in this state" (Giddens, 2005).

P. Bourdieu examines the problem of social exclusion in his famous approaches such as practice theory, symbolic structure and social structure. In his work "Distinction: A Social Critique of the Judgement of Taste", published in 1979, he describes how cultural choice and aesthetic judgments create a specific class and lead to the exclusion of individual social groups. Bourdieu notes that differences between cultures serve social stratification, which in turn leads to the dictatorship of the dominant class over other classes. In Bourdieu's research, social exclusion is extensively studied in his famous Habitus theory. The habitus proposed by Bourdieu consists of the acquired personal qualities of the individual, which determine how they perceive the surrounding world and their form of behavior in this environment. Every person's habitus is formed as a result of social upbringing and embodies the individual's social class, culture and gender affiliation. Bourdieu notes that it is precisely the incompatibility of the habitus with the dominant social class that leads to social exclusion.

Representatives of the Anglo-Saxon school have played an important role in clarifying the essence of social exclusion in sociology. Among these, the names of David Gordon, Ruth Levitas, Sarah Payne and Peter Townsend can be mentioned. The research work published at the level of the University of Bristol on social exclusion by the mentioned sociologists should be specifically noted. In this research work, titled *Poverty and Social Exclusion in Britain*, a systematic analysis of social exclusion is provided and its causes are classified. In the mentioned research materials, social exclusion is explained as the absence or limitation of individuals' access to income and other material resources, access to the labor market, access to services and access to social relations (Gordon *et al.*, 2007).

The research of M. Weber also plays an important role in the development of the problem of social exclusion. Unlike Marx, M. Weber does not agree with the idea that social exclusion occurs only within the framework of economic relations. He notes that social exclusion also occurs in the environment of politics, religion, culture and purely social relations. He tries to justify that the roots of social exclusion stem from the processes of rationalization and bureaucratization.

One of the sociologists who played a significant role in the fundamental research of social exclusion in the 20th century was the American sociologist Melvin Seeman. Deeply analyzing the causes of social exclusion in his research, Seeman points to five main models of this complex phenomenon:

1. Powerlessness - the individual believes that their activities are not sufficient to achieve the results they strive for.

2. Meaninglessness - the individual does not comprehend the significance of the processes they participate in, does not understand what to believe in and cannot explain why they should take this specific step instead of another.

3. Loss of values (Anomie) - the individual encounters contradictory role expectations and is forced to take socially undesirable steps to reach the goals set.

4. Isolation - exclusion from society and loss of social support.

5. Self-estrangement - the person not acting as they are, playing a role and going against their desires and wishes.

In explaining the more empirical cause-and-effect relationships of social exclusion, M. Castells' research can be considered closer to reality. According to M. Castells, social exclusion is a multi-dimensional process that prevents individuals and groups from accessing necessary resources and participating in the social, economic and political life of society. Castells emphasizes that in the modern era, social exclusion occurs mainly due to poverty and unemployment or results from them. Nevertheless, social exclusion includes various aspects such as lack of access to education, healthcare, housing, information, technology, as well as political participation and social networks.

Along with Castells, social exclusion is researched by Serge Paugam within this school framework. S. Paugam looks for the cause of social exclusion in unemployment and poverty, just like Castells. He explains social exclusion as dependence on social assistance and the severance of social ties (<https://rosopeka.ru/articles/2887/85888/>).

British sociologist H. Silver, who views social exclusion as an “exclusionary” process, believes that social exclusion is a dynamic process manifesting in the form of interaction between the excluding and excluded people or groups. In this case, the former deprive the latter of resources and social ties through special mechanisms. According to Silver (2007) the causes of social exclusion in different societies may change based on their unique characteristics.

The problem of social exclusion or marginalization is explained in a unique way by Ronald Munck. R. Munck is one of those who explain social exclusion in the broadest way as a result of global integration processes. His work titled *Globalization and Social Inclusion: A Critical Analysis* is dedicated precisely to this problem. In this work, Munck describes how globalization and its manifestations, such as social, cultural and social integration, affect the marginalization of various groups of people. R. Munck notes: “Social exclusion can act as a term describing the struggle against global inequality”. Exclusion calls us to fight the economic causes of traditional poverty. Munck (2005) views social exclusion as an inevitable consequence of poverty and inequality arising as a result of the concentration of resources in the hands of one group under conditions of global economic integration.

According to P. Townsend: “Social exclusion is a state where people cannot fully participate in society and cannot be considered full citizens. The main cause of this is the inability to provide oneself with living conditions according to the standards accepted in a particular society”. This is relative deprivation. According to Townsend (1993), social exclusion and poverty are closely related, as poverty (relative in this context) is one of the main causes of social exclusion.

In the fundamental research of social exclusion and inequality, the role of British sociologists Wolf and Atkinson is important. Anthony Atkinson noted that social exclusion is a multi-faceted concept and cannot be linked only to poverty and social deprivation. He classifies the concepts that can lead to social exclusion as follows:

- Economic factors: Insufficient income, unemployment and debt.

- Social factors: Isolation, lack of social communication, discrimination, low level of social capital.
- Political factors: Distance from the decision-making process, lack of access to courts of justice.
- Cultural factors: Exclusion from the dominant culture, lack of access to education and information (Atkinson, 1995).

Danish sociologist P. Abrahamson notes that in sociological literature, social exclusion is often mistakenly equated with the concept of poverty. In his view, poverty is the current state of this or that individual in relation to economic resources. Social exclusion, on the other hand, is a dynamic process reflecting the withdrawal of the individual or group from the process of social exchange. Poverty is measured vertically - i.e., upper classes and lower classes. Socially excluded people, however, should be divided into two groups: insiders and outsiders. In this case, we can speak of individuals of the same status having various series of groups (Abrahamson, 2001).

The problem of social exclusion has also been a subject of research in neighboring countries. In this field, it is possible to come across research by a number of Russian authors. Russian sociologist Borodkin (2000) notes a number of causes of social exclusion: disability, old age, people who have lost their ability to work, social groups in need of social care, orphaned children, juvenile delinquents, homeless people, people with specific diseases, the unemployed, children in general, those facing domestic violence, those suffering from armed conflicts and people who lose their material status due to climate and natural disasters. Borodkin's list is large. On the whole, his difference from Western approaches regarding social exclusion is that he does not look for the cause of the problem purely in economic factors and this characteristic is characteristic of almost all Russian sociologists.

M. Kuzhelev notes that in sociology, the term exclusion is explained as the deprivation of various social groups from full participation in various areas of society. In his view, risk groups that can be subject to social exclusion should include orphaned children, people disabled for various reasons, elderly people, those leading inadequate lifestyles and others. When the social communication access of people subject to social exclusion is restricted, the loss of their social rights usually occurs (Kuzhelev, 2019).

Tikhonova, who deeply analyzes the problem of social exclusion in Russia, has developed special indicators to reveal the essence of social exclusion in society, so that it is possible to determine the social exclusion risks of individuals or social groups based on these indicators. She classifies these indicators as follows: being provided with a job with a stable salary, accessibility of stable health services, accessibility of stable and high-quality education and cultural services, having access to social communication, accessibility of information, existence of opportunities for free initiatives and creation of conditions for an adequate place of residence (Tikhonova, 2003). In her view, it is precisely these indicators that can allow for the determination of social exclusion risks of social groups or individuals and these indicators should apply to every member of society.

In Russia, sociologists such as Eflova and Minzaripov have also classified the risk group of social populations and individuals that can be subject to social exclusion as the unemployed, prisoners, the disabled, children in general, children growing up in problem families, orphaned children, migrants, religious, racial, ethnic minorities, homeless people, people whose actions and behavior are outside the norm and people addicted to narcotics and alcohol (Eflova & Minzaripov, 2017).

Sometimes it is believed that research related to the elimination of the problem of social exclusion originated with Amartya Sen. This is not accidental. To justify this, Amartya Sen's ideas regarding social integration can be noted in a general way as follows:

1. Expansion of freedom and opportunities. Sen claims that social integration, first of all, should involve the equal expansion of opportunities for all members of society. Only in this case can both social groups and individuals participate actively in economic, political and social life.

2. Combatting exclusion and discrimination. Sen notes that discrimination against people based on their race, gender, ethnic affiliation, religious affiliation, physical abilities, etc., is unacceptable and must be fought against. Discrimination limits people's opportunities and prevents their active participation in social life.

3. Sen notes that during the implementation or preparation of social policy, diversity and the needs of various social groups within society must absolutely be taken into account. Therefore, when social policy is prepared or implemented, universal mechanisms should be avoided.

4. Social integration should be directed toward the development of the human potential of all members of society. Investment in education, healthcare and social services should assist in the development of the competencies and knowledge of individuals from all social groups and their full participation in the life of society (Tikhonova, 2003).

The concept proposed by Sen leads to the start of a new stage in the study of social exclusion. Thus, if the study of the problem of social exclusion, as we have already noted, ends with the identification of the problem in the first stage, in the second stage, the search for ways to eliminate the problem emerges.

Along with Sen, the research of American philosopher and active participant in the feminist movement Nancy Fraser has also played an important role in the formation of social inclusion theory. Her main concept is called social justice and Fraser and Honneth (2003) believes that for this justice to be established, three main problems must find their solution:

First, redistribution - the equal distribution of material resources and economic opportunities must be reconsidered. Economic inequality, poverty and the exploitation of labor must be eliminated.

Second, recognition - the cultural identity and values of social groups must be accepted by the general community and loyalty to cultural differences must be ensured. The absence of recognition leads to cultural dominance, marginalization, insult and the failure to meet the cultural needs of certain groups. Recognition is an important condition for the full participation of all communities and individuals in social life.

Third, representation. In Fraser's view, it is necessary to ensure the participation of every individual in the process of making decisions that are significant for people's lives. Here, we speak of political participation, freedom of opinion and the ability to influence political processes (Fraser & Honneth, 2003).

Canadian philosopher Charles Taylor has exceptional services in the formation of the theoretical foundations of social inclusion. Although he did not directly research the problem of social inclusion, his main works served as the basis for the development of the fundamental foundations of this problem. The principles proposed by Taylor for ensuring social inclusion are:

- Respect for diversity - acceptance of and a loyal approach to the cultural diversity of social groups.

- Elimination of marginalization - policy focused on this should eliminate existing barriers to the full participation of all social groups and individuals in the life of society.
- Ensuring interaction and communication - communication between various groups and individuals is a basic condition for a general welfare society.
- Ensuring sincerity - creating conditions for people to freely express their identity and achieving social unity through this.

One of the significant studies that played an important role in the formation of the conceptual foundations of social inclusion was conducted by I.M. Young. Her research directions have an important role in determining the content of social inclusion. Young proposes the following models for ensuring social inclusion:

1. Building communicative democracy - all decisions are made through open and inclusive dialogue. In this dialogue, all social groups can speak and express their positions.

2. Urban policy and spatial justice. In Young's view, to ensure social inclusion, it is necessary to abandon the principles of urban planning. This planning leads to the segregation and marginalization of social groups. She proposes the creation of just cities built on the principle of ensuring equal accessibility of resources for all residents.

3. Young proposes the implementation of a policy of difference by the state. The state should encourage society to accept group differences. Special institutions and practices should be created. This is important for ensuring social justice and inclusion (Young, 2002).

Social inclusion is, first of all, the right of any social group or individual, regardless of origin or social status, to participate fully in the social, economic, political, cultural and other spheres of social life. In other words, social inclusion is the removal of barriers that prevent the full integration of vulnerable population groups into the life of society. Social inclusion is the acceptance of people's identity and diversity and belief in the ability of every person to contribute to the development of society. Social inclusion is the creation of equal opportunities for all people and the creation of opportunities for every person to realize their personal potential, granting the right to choose.

### 3. Conclusion

Social inclusion requires the full participation of all members of society in the life of society and thereby calls for the maintenance of an inclusive environment. This, in turn, requires the participation of even vulnerable population groups in the process of making decisions that are important for the development of society as a whole. Finally, social inclusion involves, first of all, the creation of a more just, equal and unified society. In such a society, every individual should feel more confident and believe that they are needed.

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