

## SOCIAL INCLUSION VS SOCIAL EXCLUSION: THE CASE OF THE PREIĻI AND LĪVĀNI DISTRICTS

   
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### Abstract

In August 2021, we carried out a study of the needs of socially isolated people in the Preiļi and Līvāni districts of Latvia. The aim was to identify the real situation of social exclusion in rural areas of Latvia in order to provide a more complete picture of the needs of socially excluded groups and thus contribute to regional development policy, especially from the perspective of social inclusion. The qualitative research approach was chosen to acquire information: interviews with representatives of socially excluded groups and semi-structured interviews with professionals working with different categories of socially excluded people. Social exclusion is a sensitive topic for those who are socially disadvantaged, so the basic principles of research ethics were strictly observed: personal autonomy, non-harm, confidentiality and fairness. The study found that the most pronounced form of social isolation is exclusion from the labour market. People who are unemployed, are trapped in a 'poverty cycle' from which they cannot escape without the help of social institutions. The information obtained does not confirm the long-standing assumption that long-term unemployed are mere 'consumers of the system', nor does it confirm the assumption that socially isolated people have high expectations of a high salary. Sometimes existing attempts to improve the situation of socially isolated people are not in line with their real needs, thus failing to achieve the intended goal. In general, the specificity of the region is such that there are no mass one-size-fits-all solutions, but each situation and problem has to be tailored individually.

**Key words:** social inclusion, social exclusion, isolation, poverty, social needs.

### Introduction

Social inclusion, poverty reduction and economic development in rural areas is one of the six pillars of rural development policy in the European Union. The Common Agricultural Policy of the European Union has as one of its long-term objectives the balanced territorial development of rural economies and communities, including the creation and preservation of jobs. This objective is also relevant to rural development in Latvia, and therefore research on both social inclusion and exclusion is relevant. 2010 was declared the European Year for Combating Poverty and Social Exclusion in the European Union, and for that reason Latvia launched a broad awareness-raising campaign on the availability of resources for people in need. The EU's inclusion policy was echoed in Latvia through NGO and media activity, but not as part of government policy. It was only with the launch of Latvia's national reform programme, EU 2020, that the requirement to reduce the risks of poverty and exclusion was included (Lāce, 2012). According to the current EU Rural development policy, specific focus is turned on vulnerable population. Additionally, it is admitted that in Latvia, the continued trend of depopulation has major consequences for the long-term sustainability and quality of public services to the population in rural and sparsely populated areas (EU Rural, 2021). In 2022, 26% of Latvian population were at risk of poverty and social exclusion which was the 5<sup>th</sup> highest rate in the EU (EUROSTAT, 2023). According to the report by OECD, the gap in GDP per capita between the richest (Riga) and the poorest (Latgale) Latvian regions has slightly decreased.

GDP per capita in Latgale has increased by 5.3% per year between 2000 and 2015, slightly surpassing the growth of GDP per capita in Riga (4.9% per year over the same period). However, Riga has more than twice the GDP per capita of Latgale. As a result, Latvia remains the country with the 3<sup>rd</sup> highest regional economic disparities among 30 OECD countries with comparable data (OECD, 2019).

The need to develop a regional social inclusion policy is based on information about the actual situation in the regions, which yet is an under-researched field. One of the studies aimed at identifying the real situation of social exclusion in rural areas of Latvia was implemented in 2021 as a field study 'On the needs of the socially isolated population in the Preiļi and Līvāni districts'. It was carried out on the basis of existing perceptions of social isolation. European Union policy planning documents and theoretical literature refer to the so-called social exclusion or simply exclusion. Social exclusion and social inclusion are seen as interlinked phenomena in these documents. The concept of social exclusion offers a way of understanding the cause-effect relationship between complex living conditions and the diverse needs of individuals. Social inclusion is necessary for an individual to live well in the society through which action is taken to ensure equal opportunities for all, whatever their situation or background, and to enable them to reach their full human potential. Social inclusion is the process by which society combats poverty, inequality and social exclusion. The problem in Latvia is with the long-term unemployed as well as those people, who have lost

the courage to look for work. This is the conclusion of experts from the Organisation for Economic Co-operation and Development, or OECD, who presented their scientific study on employment in Latvia in 2019. But employment varies widely from region to region, which is why practical case studies are needed.

It is important to find out the nature of social exclusion and its manifestations in order to reduce it and thus promote social inclusion practices in Latvia, as well as to inform the general public about the situation in the districts.

### Materials and Methods

The qualitative sociological research approach was chosen for the field research in Preiļi and Līvāni districts. Given that social exclusion is a sensitive topic for those in a position of social isolation, the basic principles of research ethics were carefully observed: principles of personal autonomy and fairness, principles of non-harming and confidentiality. Participants were provided with detailed information on the objectives of the research, the respect of anonymity and the right to withdraw from the study. Some of the interviewees also exercised this right and did not wish to be interviewed, or were interviewed but did not wish to give their names and precise demographic data about themselves. The reasons for refusal varied, but a typical response was related to concerns about disclosure of personal information. Informed consent was obtained from all participants, thus demonstrating respect for personal autonomy.

Twenty members of socially isolated groups were interviewed and 10 semi-structured interviews with professionals working with different categories of socially isolated populations were conducted.

The socially isolated groups included the long-term unemployed, people without a fixed place of residence, people with disabilities, families with disabled children, people with low income, and various ethnic groups, including the Roma. They were men and women aged 24–70, who spoke both Latvian and Russian. They were asked about their current life situation, the circumstances that led to their current situation, their current needs in different areas, the support they have received, as well as their plans for the future.

The study used a case study design in order to gain as full understanding of the situation as possible to provide a meaningful explanation of the situation under study. In some cases, the so-called snowball method was used, where one interviewee could recommend for interview a person known to him or her who matched the characteristics of the target group of the study. Interpretative techniques typical of qualitative research approaches were used in data processing and analysis. The reliability of the study

is enhanced by the so-called triangulation approach to data extraction, by sampling different socially isolated populations and the institutions involved.

Theoretical literature on the social dimensions of social exclusion was used to design the semi-structured interview questions. The definition of social exclusion already outlines the main areas of exclusion, but in a broader explanation they include the following aspects:

- 1) resources: material and economic resources, access to services and social resources;
- 2) participation: economic, social, cultural and educational, political and civic;
- 3) quality of life and well-being (subjective well-being): health, living environment, crime and criminogenic situation (Dobelniece, 2022).

Isolation is the lack of social contact, limited or infrequent contact with other people, as well as the number and quality of activities in social relationships, which is directly related to quality of life and subjective well-being. Isolation is also characterised by alienation as a state of psychological discomfort. It can be both a cause and a consequence of social isolation and exclusion. Self-doubt, low self-esteem, insecurity, mistrust of other people inevitably manifest themselves in communication, thus producing loneliness. While social isolation can be measured as an objective quantity (social contacts can be counted), loneliness is a subjective experience of social isolation. However, socially isolated people do not always experience loneliness and vice versa: people who are not objectively isolated can also feel lonely. The link between unemployment and social exclusion is not straightforward: unemployment may cause social exclusion, but work does not guarantee its absence. Socially isolated people themselves experience and interpret their situation differently from the way it is defined by the responsible institutions, revealed by statistical data, determined by legislation, etc.

For this reason, exclusion researchers have found that in some cases poverty causes social exclusion, while in other cases poverty is a consequence of social exclusion. In some cases, there is no obvious link between poverty and social exclusion (Lāce, 2012)

Since social isolation is a complex and multidimensional phenomenon, where it is difficult to distinguish between causes and consequences, and which affects all areas of a person's life, Ken Wilber's integral theory has also been used as a theoretical framework. Namely, each individual is part of a larger system, so the changes initiated must affect all levels and all areas of life.

### Results and Discussion

In August 2021, 880 long-term unemployed (54% of the total number), 857 unemployed aged over 50

(52.6%) and 375 aged over 58 (23%) were registered in the Preiļi district. 24% or 391 of the unemployed were disabled. Thus, the statistics also confirm the most important social problem in the study area, namely, long-term unemployment is predominantly made up of people aged over 50. Not finding a job makes it difficult to break out of poverty, which could widen the possibilities of finding a better job. Often people find themselves in a cycle of poverty which is difficult to break without the help of public institutions. As one of the interviewees sadly pointed out: 'I am a locksmith by profession, I studied, yes, I have a diploma, yes, but no job'.

If the basic needs of individuals for adequate food, warmth, housing, etc. are not met over a long period of time, then all other issues become subordinate. Unemployment makes access to a range of resources difficult, from limited access to nutritious food, health care and eventually to cultural activities.

If the impact of individual and structural factors is assessed, we see structural factors related to known, long-standing problems like illegal employment, addictions, limited mobility opportunities, low wages, lack of suitable housing, lack of leisure opportunities, etc. The presence of structural disadvantages is evident in the stories of virtually all interviewees of this study.

However, there is a general assumption in the society about the reluctance of the long-term unemployed to work, their high expectations in terms of pay and working conditions. Although similar points were made in the context of this study, overall the information gathered does not confirm the entrenched assumptions about the long-term unemployed as mere 'consumers of the system'. The labour market exclusion of the participants in the study was long-lasting although it cannot be said that they were not working at all. Some spoke of informal casual work, referring to it as 'piecemeal'. Some of the unemployed are the so-called long-term unemployed, who dropped out of the labour market 20–30 years ago.

A 2019 study on the long-term unemployed by the State Employment Agency (ESF project 'Support for the long-term unemployed') found that one of the reasons for long-term unemployment is a lack of motivation, a mismatch between work skills and knowledge and the demand in today's labour market. In comparison with this study, the results on the causes of long-term unemployment in the Preiļi and Līvāni districts are identical to those of the SEA, but they are complemented by factors such as lack of Latvian language skills and rapid, unexpected changes in private life that have led to social exclusion. The latter factor dominates women's accounts of their life situation. If people who drop out of the labour market for a long time or only partially are the most vulnerable social group, women are the most vulnerable in this

group. For them, the family is an important factor in determining, reducing or increasing the sense of social exclusion.

The professionals interviewed also confirm that women who are co-dependent on male alcoholism suffer from violence, but due to psychological, economic and social reasons they remain largely passive and do not change the situation. Experts recognise that the prevalence of alcohol dependence is enormous and in some cases consider it to be the main social problem in the Preiļi and Līvāni districts. There are cases when people have been treated for alcoholism, but when they return to their usual social environment, they also return to their drinking habits.

One of the most common beliefs is that people who find themselves in social isolation have only themselves to blame. As one of the professionals who works with the socially isolated says: 'The society has excluded these people. They see that drunkard over there, he doesn't want to do anything, but underneath it all there are so many other problems. Society lives in stereotypes of socially isolated people. It's easier for us to assume that they are claiming benefits'.

Paradoxically, the marginalised themselves do not blame anyone for their unenviable life situation: neither the state, nor their circumstances or their peers, not even their fate. It should be noted that the determinism of circumstances is not an absolute. To make a difference in your life, you have to want to make a difference. As the examples from the study show, the social, economic and institutional conditions around us are not so coercive that the individual cannot resist them.

Another finding that emerged from the study is the self-evaluation of the situation of people in social isolation. None of the 20 socially isolated people interviewed considered their situation to be bad or unsatisfactory, no matter how objectively unpleasant the circumstances. The result of the study shows a fairly stable self-assessment. This is contrary to the common view that people who have been unemployed for a long time suffer from a constant low self-esteem. In order not to lose their self-esteem, some of the participants in the study do not want to change anything. In the conversations they showed a certain resistance to any idea that requires some kind of change. As one of the social workers admitted:

'It is often... unrealistic to motivate people to change. Unless something abnormally dramatic happens, like children being removed from their families... Or if they agree to something, it's for a very short period of time' (Study, 2021) People are afraid of possible changes, whether they will have negative consequences, as has sometimes already been the case in their situation. People do not really see themselves as active participants in improving their situation.

Because their life situation has been shaped over a long period of time, it has been transformed into a kind of *modus vivendi* – a kind of “frozen zone” where it is not very comfortable, but habitual. And that is better than any change. The persistence of a passive *modus vivendi* is a precondition for the gradual development of a negative identity – a readiness to deny, reject, isolate, ignore, to distance. Against this background, cases in which a client who is in the line of sight of the institutions significantly improves his/her life. Experts tell of cases where ‘people are struggling’ or ‘have got it’ to tackle unemployment and poverty. This is more often the case in families with children, where one or both parents are trying to provide a relatively stable environment for their children, for example by trying to fix their alcohol problem. There are a few exceptional cases where people have managed to break the ‘cycle of poverty’ and regain a good quality of life.

The study also does not support the assumption that socially isolated people have high aspirations for high wages. The interviews revealed that the interviewees consider the national minimum wage (EUR 500 gross per month) to be a good wage. The most frugal are the elderly (pre-retirement and retirement age), who are characterised by a reliance on institutional arrangements, passivity, a certain modesty and resignation to their particular situation. The income is often below the national minimum wage, but subjective satisfaction with it is relatively high. As one of the researchers on exclusion, Graham Room, points out, social exclusion is cumulative: each individual can experience different types of exclusion, as its dimensions do not exist in isolation from each other.

When people need help to overcome difficulties, they are more likely to turn to relatives, friends and acquaintances for help. Informal social networks are more widespread and more stable than institutional help, about which there is sometimes minimal information. The social services themselves admit that the general specificity of the region is that there are no mass one-size-fits-all solutions, but that each situation and problem has to be adapted individually. At the same time, the experience of each individual reflects the social manifestations of poverty, gender inequality, alcoholism and other social problems.

Low-income or single pensioners and disabled people are also socially vulnerable and often do not have enough money to buy medicines or pay for heating. But there is also a segment of socially isolated people who are beyond institutional reach.

Families with children who have special needs also face difficulties. Institutional support for these families is a matter of survival, because there is a whole complex of problems to tackle. These range

from the parents’ work problems to fit childcare around their working hours, to the education of the children, to the lack of assistants. Assisted living is one of the key support measures to enable people with disabilities to integrate independently into society. The assistant service is relatively new in Latvia, having been introduced in 2013, and has been criticised by beneficiaries, social services and the ombudsman alike regarding its inefficiency.

People in Preiļi and Līvāni have experienced the same problems as similar families elsewhere in Latvia.

Participants of the study admit that in their dealings with various responsible institutions, their representatives are often unresponsive or too much of a ‘servant of the letter’. Sometimes they are sought privately, contacts with officials in the hope that parents will then be listened to. Even when the problem is easily solvable, it lacks the will and decision of those responsible. According to parents, education and care play a huge role on the professional and human qualities. A good quality of life is achieved when social institutions are functioning and needs are being met, and subjectively people experience this as their social well-being.

It is questionable how to develop an inclusion policy for the population of a municipality that would cover a certain coherent set of actions and measures, when an existing study has shown that, in general, the specificity of the municipality is such that there are no mass one-size-fits-all solutions, but that each situation and problem has to be adapted individually.

It is also questionable whether the development of such a policy is feasible and sufficient when the presence of adverse structural factors is evident in the stories of virtually all interviewees. In addition, it should be borne in mind that the quality of life of socially isolated people is shaped by a combination of objective and subjective factors.

### Conclusions

1. Social inclusion reflects, on the one hand, the individual’s experience and social integration, opportunities for self-realisation, and, on the other hand, society’s capacity and opportunities to prevent the causes of social exclusion in order to ensure equal opportunities for all.
2. The concept of social exclusion is a more precise description of a person rather than the concept of poverty. The dimensions of social exclusion are also characterised by its domains, in which participation of individuals is limited and manifested disadvantage, as well as activities in which individuals cannot fully participate, not least in social life and level of well-being.
3. The attempts that are sometimes made to improve the lives of socially isolated people are not in

- line with their real needs. As a result, they fail to achieve their intended objective.
4. Social exclusion is localised, but the process of inclusion is global for all local forms of exclusion, shaping the globally local discourse of exclusion as it appears also in this particular field study 'On socially isolated needs of the socially isolated population in Preiļi and Līvāni'. The processes taking place there are not specific to a few social rural people in social isolation.
  5. Negative individual social experience and the same experience of cooperation with social assistance institutions are an obstacle to be overcome in people's consciousness and practices of cooperation for both parties involved. Only then will we break down stereotypes that are entrenched in social practice at an institutional level.
  6. The objective situation or specific circumstances can be interpreted differently by the individuals involved and organisations. In particular, socially isolated people themselves experience and interpret situations differently than they are defined by institutions who are in charge of these issues, revealed by statistical data, determined by legislation, etc.
  7. The study showed that the subjective perception of one's own social assessment of the social situation may not correspond to the actual circumstances, nor the persistence of an individual's *modus vivendi*, which sometimes prevails over objective circumstances.
  8. The problems of socially excluded people are much more complex than they may at first appear. They need not only material benefits and any other kind of material assistance, but also psycho-emotional support: psychologists, drug counsellors, etc.
  9. There is a need for independent access to forms of support that are provided episodically, such as a family assistant or a physiotherapist and an occupational therapist for children with special needs, etc.
  10. The most clearly expressed need in the course of the research, which was not put into words by any of the participants but which permeated their stories, was the need for social contacts (mutual meeting, support, friendship).

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