

## How should we study social exclusion? Enhancing analysis by operationalising the concept

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**Abstract:** Social exclusion is an interdisciplinary concept. It first emerged in the framework of political discourse. There is thus still some vagueness about its definition. Furthermore, its operationalisation for the purposes of quantitative studies holds a number of challenges related to access to information and the nature of the data, the selection of domains of exclusion, and sifting out the category of the truly excluded. The paper discusses important aspects of the concept of *social exclusion* that might complement and enrich analyses. It contributes to the operationalisation of social exclusion by exploiting the potential of one of the theoretical directions of the conception of quality of life and exploring the connections between the two concepts. The paper proposes an analytical framework for research based on the link between social exclusion's subjective and objective aspects, and including the notions: needs, values and satisfaction.

**Keywords:** social exclusion, quality of life, needs, values, methodology

### Introduction

The concept of social exclusion appeared in political discourse in the mid-1970s (at first in France, and then in other West European countries) and has continuously been undergoing changes of meaning, which is why it has remained unclear. This indeterminacy has allowed for greater flexibility in studies but is, at the same time, a conceptual and methodological challenge. The task of studying social exclusion becomes even more complicated when quantitative methods are to be applied. These methods become increasingly necessary due to their statistical advantages, related to the conclusions' reliability and accuracy. They are also needed because social exclusion must be measured to assess the progress made in this sphere (for the needs of policy-making and when comparing countries across Europe).

**The purpose** of this paper is to propose some additions to analysis that may contribute to operationalising the concept of social exclusion for the needs of quantitative studies. In order to achieve this goal: we have sketched the characteristics of the concept; we have outlined the main limiting conditions when

conducting quantitative research concerning exclusion; we have suggested a methodological solution in terms of the quality of life approach; we have analysed the connection between the two concepts; we have proposed an analytical research framework, based on the connection between subjective and objective, and which introduces into the analysis the notions of needs, values and satisfaction; the pitfalls that the researcher should watch out for in this analytical framework have also been discussed.

### **Conceptualising social exclusion**

Two basic approaches to the definition of social exclusion have been described in the literature (Silver 1995; Saith 2001; Levitas 2004; Atkinson 2008, etc.):

✓ French sociology defines social exclusion as a loss of collective values, the disruption of social cohesion, a situation where solidarity ceases to operate, a non-class of people emerges (people positioned outside all classes). Exclusion is viewed in the context of citizenship. Interests here are not separate but shared - they are the interests of the whole society. When a citizen does not meet society's moral values, he/she is excluded from the community. The social fabric is torn. The excluded are a menace to the achieved cohesion of society. One must show that strives actively to participate in various spheres of public life in order to be included.

✓ Anglo-Saxon liberal thought presents exclusion as a limitation of an individual's access to his/her rights. Citizenship is a social contract based on the possession of equal rights by all people. Social integration consists in freely chosen relationships between people. It is obtained through a person's ability to move from one social group to another freely. Social exclusion reflects the system's distortions, which include discrimination, market failures, and unfulfilled rights.

Both approaches are derived from the concept of relative deprivation. In France, this is a convenient way of getting out of the discourse framework regarding the failure of the welfare state's social policies (Silver 1995, 64-65). In the UK, the concept was imported from the European Union and underwent several changes, starting from the issues of redistribution of resources, passing through integration as the response to exclusion, and coming to the definition of the excluded as a subclass whose values differ from those of the rest of society (Levitas 2004, 43-45). In the last-mentioned modification, the concept comes close to the French one. In Great Britain (and not only there) the concept has also been used to proclaim that poverty no longer exists (Atkinson 2008).

In numerous publications on social exclusion, many authors avoid giving a concrete definition of the concept. There is still no generally accepted academic definition, as the concept, a relatively new one, originated from political speech and is constantly changing in meaning.

Some typical features between the definitions and the conceptual commentaries in respective studies (Rodgers 1995; Silver 1995; Berghman 1997; Burchardt, Le Grand, Piauchaud 1999, 229-230; Sen 2000; Saith 2001; Levitas et

al. 2007; Barnes et al. 2006) enable distinguishing the characteristics with which most authors agree. Social exclusion is:

- a **process**, not a static condition;
- deprivation of **rights and capabilities, and not only of resources**; inequalities go beyond income inequalities;
- a characteristic that appears among **those who are different**: it occurs when a person differs from the others and does not meet the generally accepted criteria;
- a **lack of participation** in various aspects of life;
- it is **multi-dimensional** and can appear simultaneously in several domains;
- **it does not necessarily involve non-participation in employment**, unlike disintegration and de-qualification, where the people rejected from society are those who do not work, which society finds unacceptable. People who are not working may be excluded, even though this situation of theirs is legitimate according to the social norms.

For instance, it is socially acceptable in many countries for people with disabilities, elderly retired people, single young parents to not work. If they are excluded in some way, that is not because society is “labelling” them as nonworking and nonproducing for the general good. In these groups, the disruption of the social tissue, the failure of solidarity in society, may stand out more obviously.

A comparatively clear and full definition, which sums up these characteristics, is the following: “*Social exclusion is a complex process operating across several dimensions or domains. It involves both the lack or denial of resources, rights, goods and services, and the inability to participate in the normal relationships and activities, available to the majority of people in a society, whether in economic, social, cultural or political arenas. It affects both the quality of life of individuals and the equity and cohesion of society as a whole*” (Levitas et al. 2007, 86).

This definition asserts the connection between at least two concepts: social exclusion and quality of life. The former reveals non-participation in society and the multiple dimensions of this unfavourable situation. The emphasis is on rights, possibilities, and their restriction. The latter reflects various aspects of life, which, according to some of the quality of life conceptual approaches, are assessed subjectively by people. There is some overlap between the two concepts, but serious differences as well. If used jointly, they complement each other and give greater depth to research. These positive points will be discussed further below.

### **Approaches in operationalising and limiting conditions**

We may distinguish two methodological approaches applied in operationalising social exclusion. Studies involving the first of these two are more often aimed at participation issues through the optic of democracy, citizenship in the welfare state, and the interaction between institutions. Their application usually requires the use of methods that collect an enormous amount of contextual information - methods such as case studies, focus group discussions, in-depth

interviews, etc. (Walsh, Scharf, Keating 2017). Such research is vital for adding new aspects of social exclusion. It paves the way to a clearer and more precise definition of the concept and permits studying the process of exclusion more deeply at its every stage. But the conclusions of such research are not statistically supported.

The second approach permits studying the various social exclusion parameters (separately and all together) quantitatively and measuring them accurately. This is its advantage. When operationalised, this approach likewise displays two main orientations.

In EU practice, the exclusion is viewed, by definition, as multi-dimensional (European Commission 2004, 10). But the main emphasis is on poverty and employment, and cross-country comparison of performances (European Commission 2007, 5). The Eurostat statistical programmes serve this viewpoint: the Laeken indicators are used to measure income inequalities mainly. Nine of all 18 primary and secondary indicators concern monetary poverty questions, five cover access to employment, and two are about healthcare and education. This framework was further adopted in the Europe 2020 strategy.

In scholarly literature, social exclusion is presented as multi-dimensional. A large part of the relevant studies focuses on at least four or more aspects of exclusion (Burchardt, Le Grand, Piachaud 1999; Scharf et al. 2001; Barnes et al. 2006; Levitas et al. 2007; Walsh, Scharf, Keating 2017, etc.). The main limiting conditions for operationalisation here come from several directions.

First, official statistics often fail to provide data on a considerable part of the domains of exclusion<sup>1</sup>. Official sources mainly offer data on monetary poverty, employment, and, to some extent, on healthcare, education and social services, but do not cover aspects such as social ties or participation in political and cultural life. Only recently, have some ad-hoc modules in Eurostat's Income and Living Conditions Study incorporated questions relevant to some of the mentioned aspects. However, the core questions still refer to income and income status. The provision of new data and complementing the existing ones, through surveys (for instance, the European Social Survey and the Survey of Health, Ageing and Retirement in Europe) comes up against restricted possibilities to interpret the data, because the information comes from different sources.

The second challenge is the dynamic nature of social exclusion. To encompass past events and to assess their impact on the present dimensions of exclusion would require a longitudinal analysis, for which it is hard to provide data. As the concept is relatively new, detailed longitudinal analyses such as might fit the concept of social exclusion have not been made. This limiting condition can be compensated for, somewhat, by studies that include some biographical component, i.e., data related to past events or containing some assessment of an individual's previous period of life.

The third challenge is of a methodological kind. Researchers still disagree as to the starting point from which to build up scientific cognition: whether from the researcher's perspective or the viewpoint of the researched. The ques-

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<sup>1</sup> Valid for Bulgaria.

tion is whether establishing the possible lines of exclusion should happen in the course of the study, in the collection of information, without any preliminary structure. That is, whether the rights and possibilities to which it is considered “normal” for an individual to have access, should be assessed from his/her viewpoint without a preliminary list, as Sen proposes (Sen 2004, 79). Perhaps this is a better way to sift out what should be considered “normal” and what deviates from the “normal”. This is feasible in qualitative studies. But how can it be applied in the quantitative ones?

On the one hand, this expands the researcher’s horizon, making his/her position more flexible. On the other hand, insofar as any quantitative study implies some structured analysis, and it is hard to work without a reference point ensuring comparability, elaborating lists (including lists of rights and capabilities to which people should have access) is justified and necessary. Still, the question remains as to which domains should be analysed.

The last methodological challenge is related to the use of indicators. The question is whether, when a variable displays deviation from the “normal” in an unfavourable direction, this necessarily implies exclusion or not.

Using the concept of quality of life may contribute both to the selection of exclusion domains and sifting out genuine exclusion as opposed to a position that is labelled as unfavourable or disadvantaged but is not necessarily such.

### **Exclusion and quality of life: different, but complementary, concepts**

What quality of life means is also a question on which there is no unanimity. One of the variants of this concept appeared in the 1970s: the terms “*subjective quality of life*” or “*subjective well-being*” link the concept to “*the subjective perception of personal well-being both in the general sphere of life and in separate life domains*” (Marikina 2006, 30). The central critique against this current is related to subjectivity, and to the fact that reality is studied only in this single perspective, that academic cognition is drawn independently from the objective sphere lying outside people. We agree with this critique. The subjective, which people desire and value, may enhance our analysis, but it must be investigated in parallel with objective reality.

Wiggins et al. indicate the need for additional theorising on the concept of quality of life, for taking greater account of peoples’ experiences (the subjective ones), while objective measures should remain among the factors (Wiggins et al. 2004, 695-696). That is what distinguishes social exclusion, which in some studies is conceptualised as a deviation from the “normal”, the average statistics typical for the majority of people (Burchardt, Le Grand, Piachaud 1999). It is measured by means of objective indicators that register a factually existing situation.

We rarely find studies that comment on the connection between social exclusion and quality of life. According to Levitas, studies treat the quality of life issues as social exclusion components in cases when non-participation in employment is socially legitimate (Levitas et al. 2007, 51). In some studies, this connection is traced intuitively for the purpose of empirical analysis without leaning on a solid theoretical foundation (e.g., Barnes et al. 2006).

The connection between the two concepts involves the question of whether the different dimensions of a socially unfavourable position factually indicate social exclusion or not. Given the already mentioned incapability for, or limited access to, rights situated in the environment, it is necessary to introduce an additional criterion showing exclusion not only as a deviation from what is “normal” for the majority, but also as a condition that the individual himself assesses as disadvantaged.

Let us imagine that the researcher has some data that a widowed older person, with a small income, has limited (by the standards of what is considered normal) social contacts, or that the quality of his/her contacts (assessed in terms of the capacity to lead an intimate, personal conversation with someone) is poor. In a quantitative survey, there is the risk that this could be interpreted as a case of exclusion that does not involve unemployment. Though, the person’s assessment of this situation might be different. One might value friendship and mutual relations with people highly and hence feel lonely and isolated. His or her basic needs (for belonging and love) are not fulfilled. But again, one might not define himself or herself as isolated, hence, as dissatisfied. That is, one might feel contented enough with his or her amount of social contacts because one values other things more (for instance, the privacy).

In the former case, the privation of social contacts must not, by definition, be the result of personal choice. Other people might not want to communicate with the person for some reason (he/she is too old, he/she is different, his/her interests are not shared, he/she is poor, acts “improperly” according to others, etc.). The person is dissatisfied, and his/her condition can definitely be considered a case of exclusion. In the latter case, given that there is no declared need, social contact deprivation cannot be interpreted as exclusion. A person is happy with his/her position. Very probably, he/she chose to be in it<sup>2</sup>.

In our opinion, the subjective person’s assessment of his/her situation, as a component of the quality of life concept, could serve as **an additional criterion in quantitative research**, and may enrich and refine the social exclusion analysis.

By including the respondent’s self-assessment of his/her position, we establish a link between social exclusion and quality of life. Social exclusion represents a disadvantaged position that leads to an aggravation of the quality of life. This specification in the definition of exclusion allows us to develop further the research framework of Burchardt, Le Grand, Piachaud (1999), in which a distinction is drawn between voluntary and non-voluntary exclusion. The two terms are based on Sen’s capability approach. Obviously, it is not the same thing to suffer from hunger and to fast voluntarily, although the two situations can be defined as a restricted intake of food, as Sen points out (Sen 2005, 155). Looking only at the objective criterion, we could hardly analyse the phenomenon of poverty and exclusion correctly and precisely<sup>3</sup>. We risk declaring a particular

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<sup>2</sup> It is probable, but not unquestionably sure, as the analysis faces certain pitfalls, to be further discussed in this paper.

<sup>3</sup> Our example does not exclude the possibility that a person may have a satisfactory degree of social ties and yet feel lonely. In this case, the exclusion is not evident. The subjective feeling is probably due to inner psychological characteristics. The danger of voluntarism is thus avoided.

position as exclusion when, in fact, it is not. When studying social exclusion, it is essential to have in mind what a person values and desires.

The distinction can be usefully applied in analysis when studying a small group of people with common characteristics. This distinction might then be used to sift out the domains of exclusion from a preliminary list of such. If this is done carefully, it may be found that things are very individual and the researcher should look out for specific pitfalls, which will be discussed further below.

How can we determine what people value? It is necessary to include in our analysis indicators that reflect people's values and/or needs.

### **The place of values and needs in the concept of exclusion**

Analyses of values occur most often in studies pertaining to philosophical and sociological literature; and of needs, in the literature on economics and management.<sup>4</sup> The two are not equivalent concepts.

What needs and values have in common is that, when studied, the effects they engender are perceived to be components of a network of motivators that incite the human behaviour or action (including social action). Such theoretical constructions serve as a basis for the works of A. Maslow, D. McClelland, C. Alderfer, F. Herzberg, K. Marx, etc., with regard to needs; and for M. Weber, T. Parsons, M. Rokeach, G. Hofstede, S. Schwartz, etc., with regard to values (Parsons et al. 1962; Weber 2001; Maslow 2010; Nacheva 2011; Garvanova 2013). Before inciting an individual action, values and/or needs, together with expectations, serve as criteria for assessing the position in which a person finds himself/herself. This position may be assessed as favourable or unfavourable. It is a subjective assessment of a given objectively determined socially disadvantaged position, which is of interest for us when we mean to sift out social exclusion.

It is hard to draw a clear dividing line between values and needs. The two terms differ in at least two aspects: their duration and the way they emerge.

In a narrow sense, needs are egoistic in origin<sup>5</sup>, being aimed at the individual's satisfaction. The choice motivated by needs is a rational one. The individual decides what is advantageous (of the highest utility) for him/her, and what is not, and makes his/her decisions accordingly. In this respect, needs are different from the motivators that incite moral action. Because of this particularity of needs, they cannot be included in the analysis of behaviour strategies that have an irrational basis. The subjective dissatisfaction might not be generated by rational incentives.

A need is not enduring. Once a need is satisfied, it dies away, according to some authors (based on Gossen's First Law and on the Law of Diminishing Marginal Utility); and according to others, it is replaced by higher-order needs (Maslow 2010). However, just as values may lead a person to follow a particular mode of behaviour, so can a periodically recurring need.

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<sup>4</sup> And for both concepts, in psychological literature.

<sup>5</sup> In a broad sense, they are of an existential kind.

A value's nature is stable. It is linked to all that is significant for a person and reflects his/her beliefs and convictions. The dominant values underlie culture and determine the goals set by society or the individual as well as the paths of their realisation (Parsons et al. 1962; Weber 2001; Garvanova 2013).

A person's system of values is mainly shaped during the period of his/her socialisation (childhood and schooling). It is a link between the social system and the personality system. A person acquires it by internalising certain cultural norms (valid for the whole community) and the value orientations of another person (or several others), who is important for the child and whose actions encourage or sanction the child. Thus, a value becomes part of the personality. When a value system is created, the child's existing needs (primarily biological) are modified. New, higher-order needs might be added to them. The process of socialisation also consists in maintaining a definite mode of conduct and obeying certain norms, which the individual is obliged to follow in order to gain the approval of the social environment, even if not really sharing them (Parsons et al. 1962, 17-25). Values are not transmitted in their entirety and are not the same in different generations (Inglehart 2008).

Values are not rigidly enduring phenomena, but they are hard to change, according to Rokeach (Garvanova 2013). An individual's socialisation is a process of assimilation of cultural norms that depends on his/her **social role** (Parsons et al. 1962, 19-20). When a social role changes (e.g., when a person passes to a next phase of his/her life cycle), the community's expectations as to what is admissible for him/her, and what not, change. This happens when an individual marries, becomes a mother or father, makes transitions in employment, or retires. At those points, conflicts may arise, related to the changes that need to be made with respect to one's expectations from the social environment in accordance with the "new" social norms. These changes are essentially part of the process of socialisation. **We might call this late (occurring at a mature age) and partial (because the cultural norms do not change indeed) socialisation.** Such socialisation, however, is much more painful than the one occurring in childhood, due to the weaker adaptivity of people who have already acquired fixed personalities. It seems very probable that, in this type of social interaction, the social norms and values that do not match the new role expectations will never reach the stage of internalisation.

Parsons differentiates three types of ego responses to role expectations: 1) conformity; 2) alienation; 3) creativity (when the ego sets goals and standards of its own; accepts the expectations but builds upon them) (Parsons et al. 1962, 20). The social interaction occurring when social roles are changing does not equal social exclusion. In analysis, the former could be viewed as related to the latter providing that the new role expectations held by the environment are loaded with (discriminatory) stereotypes (for instance, ageism) and if they lead to alienation for the individual or to conformity. In these cases the individual's actions are made to match the new role expectations even though the individual assesses this development negatively and feels dissatisfied.

The common feature between need and value is that they represent a link between the person and the social environment. A concrete need provokes an assessment of the situation, but the latter is short-lived and, in some cases (but

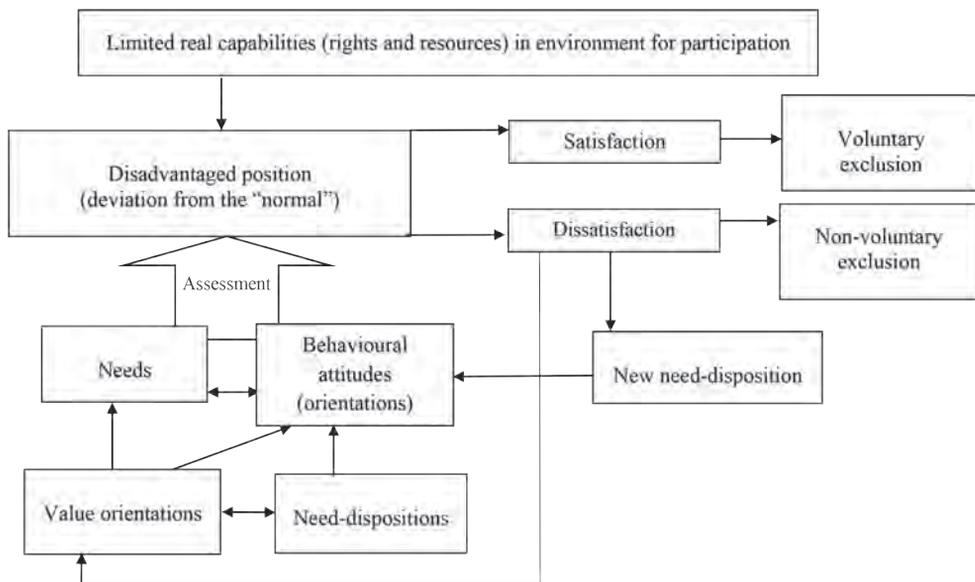
not always), may be based on something more enduring, i.e., a value. It is difficult to measure values and needs. What is actually being measured in studies are the dispositions/motives and attitudes/orientations. These are better suited for measurement as they are more stable and less abstract.

In his theory of action, Parsons introduces the concept of need-disposition. It is more enduring than a need but differs from value orientation in the way it arises. Based on his/her capacity to learn and generalise information about different objects, an individual classifies those objects in terms of particular traits that are significant for him/her. When interacting with new objects possessing similar traits, he/she places them in the same focus and pattern of orientation. This ability creates a predisposition for certain needs with relation to unfamiliar objects as well, and a general expectation for satisfaction of needs. Such expectations lead to a certain assessment of the object depending on the gratification or loss it might bring (Parsons et al. 1962, 10-12). In other models, need-dispositions are equivalent to motives, e.g., Atkinson (Nacheva 2011, 36-38).

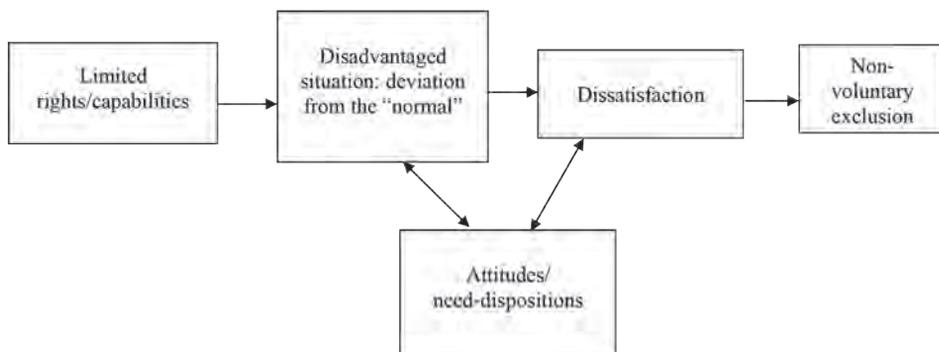
A need-disposition and, respectively, the assessment, expectation and orientation linked to it, may change through interaction between the social actor and his/her environment containing other actors. When the environment creates obstacles for the individual to realise his/her desired rights, this affects his/her dissatisfaction.

Based on our discussion, in Fig. 1 we propose a theoretical schema for a framework of research analysis in different domains of exclusion.

The schema is provisional, as its components are in constant interaction and change.



**Fig. 1.** Operationalising social exclusion in terms of objective and subjective: interaction between the external environment and the internal state



**Fig. 2.** Sifting out non-voluntary social exclusion through the filter of attitudes and need-dispositions and the subjective satisfaction, in cross-sectional studies

An example of working with indicators of need/need-disposition when sifting out exclusion is the formulation and analysis of questions as to whether a person was in need, but did not utilise services and whether he/she sought to obtain them (biographical elements). Such questions are applied and are appropriate mainly for assessing access to services (for instance, medical services in SILC), but are not included for domains such as social contacts and political/civic participation. In the latter cases, adequate questions would be those related to attitudes, for instance, whether, for him/her, “it is important to demonstrate his/her abilities; wants people to appreciate what he/she can do” (Evropeysko sotsialno izsledvane - shesta valna 2012-2013).

In cross-sectional studies, it is possible to work only with one of the constructs: only with attitudes and need-dispositions instead of values and needs (Fig. 2).

The research comes to analysing in parallel the objectively unfavourable deviation from the “normal” in terms of subjective dissatisfaction, thereby sifting out voluntary from non-voluntary exclusion. It thus seeks for evidence whether exclusion is the case or the deviation from the “normal” is a result of the desires and preferences of the “excluded” person.

### **Limiting conditions and pitfalls for analysis**

Certain conditions set limits on analysis and therefore, should be taken into consideration. Values, need-dispositions and, respectively, satisfaction with a given position are dynamic features and can be adapted. According to Rokeach, values do not change but may be rearranged in order to diminish a feeling of dissatisfaction (Garvanova 2013, 9). Moreover, as pointed out above, a person’s choice and feeling of satisfaction are not always of a rational kind.

At least two possible conditions may result from a disadvantaged social position and dissatisfaction with it.

In one case, the result might be a reformulation of the need-disposition and, consequently, of the whole value, towards rejection of its importance in the individual’s value system. Such is Elster’s view on adaptive preferences. He defined adaptive preference by taking as an example La Fontaine’s fable about the

fox and the grapes. An adaptive preference appears when “*people tend to adjust their aspirations to their possibilities*”. If the possibilities are limited, the preferences are oriented to those possibilities and do not exceed them (Elster 1982, 219). One example of an adaptive preference is when elderly people retire early - in order to “make room for the young” or because they would feel more secure when retired, although they might wish to continue working.

In another case, a given limited right or resource becomes even more desirable for the individual, according to Inglehart’s scarcity hypothesis (Inglehart 2008). In other words, we have, again, an adaptation of preferences, but in a reverse direction. For Elster, adaptation consists in putting up with dissatisfaction and pushing a value further behind. For Inglehart, it brings consolidation and strengthening of the need-dispositions and raises a concrete value orientation higher up on the scale.

In Fig. 1, adaptation of preferences in either direction is represented by arrows pointing from dissatisfaction towards (the appearance of) a new need-disposition and towards value orientations (which could be rearranged).

One should be careful about how to interpret a given value in the context of social exclusion. This imposes an even greater requirement for “double insurance”, i.e., for a study of the individual’s satisfaction and its connection to attitudes and need-dispositions, on the one hand, and a given unfavourable social position, on the other. **In the course of analysis, special attention must be paid to these pitfalls to avoid overestimating or underestimating the significance of a given socially disadvantaged position (and rejecting it from the category of social exclusion). This means dissatisfaction does not always serve as an indicator of exclusion, and researchers should be mindful of that. Accounting for the possible pitfalls in the interpretation is imperative likewise because of the risk of political abuse of such a schema of analysis.**

## Conclusion

The theoretical schema presented above enables us to approach the questions of exclusion carefully, not in a voluntaristic way (i.e., a way that refers only to the stance and views of the researcher as to which deviation from the “normal” should be considered an instance of exclusion, and which not). This addition to operationalisation supports research by enabling the growth of knowledge as to what is or is not significant through the viewpoint of the surveyed persons themselves. The schema stresses the importance of double-checking before the researcher qualifies a given socially unfavourable position as social exclusion - the view as to an unfavourable position might in fact reflect the researcher’s own value system. After establishing that particular real capabilities and rights are lacking in the environment, these are checked in the perspective of values/needs and the perspective of the satisfaction experienced by supposedly excluded people. This framework of analysis helps sift out more cautiously the domains of exclusion. When handling information carefully, and taking into account certain limiting conditions, this sorting out takes place in the course of research, even when working with a preliminary structure of exclusion domains.

It is even more necessary to introduce values, needs and satisfaction into analysis when working with cross-sectional quantitative data, and when there is no available longitudinal information that might enable much more precise assessments and display exclusion as a process. This variant of cross-sectional analysis gains even greater precision when some biographical elements are added to the data on attitudes and need-dispositions. With this combination of evidence, and with attention paid to the possible pitfalls, one may, even when working with cross-sectional quantitative information, at least partially fulfil the requirement that social exclusion be studied as a process. The proposed additions would be useful for planning specific surveys on the topic, and for improving questionnaires used in official statistical studies.

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