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For discussion and
recommendations

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IN-DEPTH REVIEW OF MEASURING SOCIAL EXCLUSION

**Note by Statistics Canada and the National Institute of Statistics
and Geography of Mexico**

This in-depth review examines the concept of social exclusion and the differences in methods national statistical offices use to measure social exclusion. The note summarizes international activities related to measuring social exclusion, and identifies issues and challenges. The conclusions and recommendations from the review are presented in Section VII. The Bureau is invited to discuss the issues and challenges in measuring social exclusion and consider how to address them.

I. BACKGROUND

1. This review examines the concept of social exclusion and the differences in methods National Statistical Offices (NSOs) use to measure social exclusion. To be socially excluded is to be limited in one's ability to fully participate in society. These limitations can arise from physical characteristics, limited access to material and/or social resources, poor health, generational inequalities, a denial of rights or other sources.

2. Part of the debate is whether or not low income is an important concept in the measurement of social exclusion, or if it is rather a symptom of someone who is already excluded. Many of the NSOs who were examined in this paper use low income as part of their measurement of social exclusion but do not include it in their definition of what social exclusion is.

3. Another area of difference is whether belonging to a workless, or underworked, family can make the household social excluded. Some NSOs include workless or underworked in their index, due to the premise that they have a limited social network compared to people who are employed.

4. The methodology used to examine social exclusion varies by NSO. Many countries in the review have experimented with a national material deprivation index, although not all are active. Eurostat, Mexico, and to some extent, the United Kingdom and Ireland all use indexes to measure social exclusion, while Economic Commission for Latin America and the Caribbean (ECLAC), Canada, and Australia use numerous indicators. The various methodological methods do not allow for easy cross country comparisons, with the exception of European Union (EU) member states participating in the European Union Statistics on Income and Living Conditions survey (EU-SILC).

II. INTRODUCTION

5. The Bureau of the Conference of European Statisticians (CES) regularly reviews selected statistical areas in depth. The aim of the reviews is to improve coordination of statistical activities in the UNECE region, identify gaps or duplication of work, and address emerging issues. The review focuses on strategic issues and highlights concerns of statistical offices of both a conceptual and a coordinating nature. The current paper provides the basis for the review by summarising the international statistical activities in the selected area, identifying issues and problems, and making recommendations on possible follow-up actions.

6. The CES Bureau selected social exclusion for an in-depth review for its February 2018 meeting. Statistics Canada, with the assistance of the National Institute of Statistics and Geography of Mexico (INEGI), was requested to prepare the paper providing the main basis for the review.

III. SCOPE/DEFINITION OF THE STATISTICAL AREA COVERED

7. To be socially excluded is to be limited in one's ability to fully participate in society. These limitations can arise from physical characteristics, limited access to material and/or social resources, poor health, generational inequalities, a denial of rights or other sources.

8. The study of social exclusion generally focuses on the inequality of opportunity of individuals rather than the inequality of outcomes (OECD, 2017). A person who faces social exclusion is less likely to be promoted or to get adequate public services in their communities to deal with their health or educational needs, due to their societal position (OECD, 2017). Social exclusion also contributes to a lower sense of self-worth (OECD, 2017). Many of the problems associated with social exclusion are large systemic problems that exist in all societies (UNECE, 2017).

9. The extent to which social exclusion is a problem in society is hard to measure because it is difficult to quantify the number of people who face social exclusion, or the degree to which people are at risk of social exclusion. As well, very few surveys or statistical methods are exclusively designed to measure social exclusion. Therefore, most numeric measurements of social exclusion rely heavily on methods that measure material and social deprivation, and then interpret an individual's level of social exclusion.

A. Concepts

10. The concept of social exclusion is linked with that of poverty, and disentangling them is conceptually difficult (Levitas, 2006). The study of poverty tends to focus on the limitations a person has due to lack of resources - their low income, poor living conditions, and/or debts they acquired. The study of poverty therefore is more closely linked to outcomes, rather than deprivations or disadvantages that limit participation. Nevertheless, income poverty may be listed among the deprivations underlying social exclusion, and conversely some definitions of poverty include aspects of social exclusion (Levitas, 2006).

11. Social exclusion is generally discussed within the social cohesion and social inclusion framework. Social cohesion and social inclusion are often used as synonyms, however there are important differences between the two. Both focus on the importance of

community but view it in different terms. Social cohesion focuses on the personal feelings and satisfaction of feeling like a person belongs as a member of society, whereas social inclusion looks at the non-psychological benefits of being a participatory member of society (ECLAC, 2007a).

12. On the other side of the spectrum is the definition social exclusion, the direct antonym of social inclusion, and it can be rather ambiguous, as it is often defined by what it is not than by what it is (Behrman et al, 2002). Many people cannot define social exclusion, but can provide examples because “(they) know it when they see it” (Behrman et al, 2002, pg.10). Social exclusion has been described as a “chameleon like concept whose meaning can be stretched in numerous, even conflicting, directions” (Daly, 2010, pg. 145) and as “rarely clearly defined” (Levitas, 2006).

13. While social exclusion may have been given various interpretations, the interpretations have common strands. Social exclusion is most often linked with material deprivation (lacking material resources) or social deprivation (lacking social resources). However, people who face material and social deprivation are not the only types of people who are at risk for social exclusion. One study describes persons as socially excluded if they fall into one of the following groupings:

- a) faces some type of non-monetary deprivation;
- b) does not actively participate economically, socially, politically, or culturally;
- c) has a poor quality of life (Levitas et al, 2007, pg. 10).

14. Therefore, social exclusion is sometimes a symptom of a person’s level of poverty, but the reason for a person’s inability to actively participate in society could be due to one of the other factors listed above.

15. Additionally, social exclusion recognises that persons can be excluded in multiple dimensions. If a person can be described to be in more than one category, the person is thought to face a higher level of social exclusion than had they only been described in one category (Levitas et al, 2007).

B. Capabilities model

16. One of the better known social exclusion models is Amartya Sen’s capabilities model. In *Development as Freedom*, Sen argues that social exclusion is a social justice issue that should concern everyone and that social exclusion, capabilities deprivation, and relative poverty are all synonymous with each other (Sen, 1999). In the book, Sen discusses the ideas behind his capabilities model, describing the history of economic justice theory and how social policy should focus on the limitations people face that prevent them from being full active members of society, instead of relying solely on income measures (Sen, 1999).

17. Others have since adopted Sen’s capabilities approach as a framework to monitor social exclusion in societies. The NSOs in Denmark, Sweden, Finland and the United Kingdom use the capabilities normative approach when forming their multidimensional indicators (Duclos, 2011, pg. 32). Thus, changing the priorities of some NSOs from strictly measuring personal income levels to now measuring citizens’ life satisfaction, access to

services, material and social deprivation and environmental conditions (Duclos, 2011, pg. 33).

IV. OVERVIEW OF INTERNATIONAL STATISTICAL ACTIVITIES IN THE AREA

A. Eurostat

18. In 2009, Eurostat began measuring the degree to which material deprivation affects citizens from across the EU (Guio et al, 2017). The 2017 revision of material deprivation variables focuses on 13 items, from the EU-SILC questionnaires that are provided to Eurostat by NSOs (Guio et al, 2017). This information is used to calculate the rate of deprivation, at a national level and EU level, as well as for different age ranges (Guio et al, 2017).

19. Eurostat's material deprivation index is one of the three sub-indicators that are part of a larger indicator, At-risk of Poverty or Exclusion or AROPE (Eurostat, 2013, pg. 3). One of the other sub-indicators is "a relative component: the at-risk-of poverty rate/monetary poverty (AROP)" (Eurostat, 2013, pg. 3) which is anchored in time with the poverty threshold set at 60% of median earnings in 2008 (Eurostat, 2013, pg. 7-8). The last component of the AROPE regards those who are excluded from the labour market (Eurostat, 2013, pg. 3). The inclusion of the labour market indicator is due in part to the idea that working provides workers a social network they would not have if they were unemployed.

20. People who are present in more than one of the sub-indicators are only counted once as being social excluded, even though they are experiencing social exclusion from various perspectives (Eurostat, 2013, pg. 4).

B. Economic Commission for Latin America and the Caribbean

21. ECLAC uses a variety of indicators to measure social exclusion and social cohesion within and across Latin American countries. The ECLAC uses the International Labour Organization's (ILO) long-term unemployed and underemployed as indicators for social exclusion (ECLAC, 2007b). The ECLAC argues the underemployed and long-term unemployed face potential poverty if they have no savings, as well as not having the type of social network one may have if in a permanent position, contributing to their potential social exclusion (ECLAC, 2007b).

22. Other indicators the ECLAC uses for measuring social exclusion and social cohesion include the GINI¹ index and the income quintile ratio, to measure the variation in salaries among citizens (ECLAC, 2007b). They also measure the percentage of people contributing to government welfare programs through taxation, as these programs are smaller in Latin American countries compared to Europe and therefore their success rate should be dependent on size (ECLAC, 2007b).

23. For health indicators, the ECLAC measures the infant mortality rate as well as the HIV mortality rate among 1,000 citizens (ECLAC, 2007b). Finally, they measure different

¹ The Gini coefficient is a measure of statistical dispersion used to represent the income or wealth distribution of a country's residents.

types of education rates, including the amount of children in pre-primary programs, enrolment rates for school-aged children, and adult literacy rates (ECLAC, 2007b).

C. United Nations Development Programme

24. As the United Nations Development Programme (UNDP) has a different mandate than NSOs, the way in which they use the term social exclusion differs. Social exclusion in their context is more focused on basic needs, and is similar to the UNDP's 2010 multidimensional poverty measure, however, the methodologies used to measure the concepts differ slightly (UNDP, n.d.).

25. The UNDP index created to measure social exclusion in Eastern Europe has 24 indicators for three dimensions, eight for each dimension, and uses methodology similar to (UNDP, n.d.). A person is considered to be social excluded if they are seen as being deprived of nine of the established indicators (UNDP, n.d.). If a person is deprived in more than one dimension they are viewed as suffering from a larger depth of exclusion (UNDP, n.d.).

V. COUNTRY PRACTICES

A. Australia

26. The Australian government created the Australian Social Inclusion Board to measure to the extent which social exclusion affects her citizens, and how different policy changes increase or decrease social exclusion within the country (McDonald, 2011). The main goals of the board is to measure Australians participation in civil society based on their socio-economic standing, marital status, race, gender and their employment status, as well as the effect these statuses have on their children (McDonald, 2011).

27. The Australian Social Inclusion Board publishes two indexes that measure different dimensions of social exclusion, using data provided by the Australian Bureau of Statistics (ABS). The first index, "People in Households with Low Economic Resources and High Financial Stress", uses data from the Household Expenditure Survey on the bottom 30% of the income distribution and whether people reported five or more financial stresses out of a possible 15 in the past 12 months (Australian Social Inclusion Board, 2012, pg. 28).

28. The second index, "Proportion of People 18 to 65 Experiencing Three or More Disadvantages" calculates the percentage of Australians who face social deprivation through six categories through data collected by the ABS General Social Survey (Australian Social Inclusion Board, 2012, pg. 23). The categories of focus include those who are 'low income, not working, in poor health, low education, feeling unsafe and report low levels of support' (Australian Social Inclusion Board, 2012, pg. 23).

B. United Kingdom

29. The Households Below Average Income (HBAI) is the United Kingdom's low income line, which is composed from data from the Family Resources Survey (FRS) (Department of Work and Pensions, 2016). The HBAI is the basis for the country's measurement of social exclusion. It consists of two main low income lines which include the Before Housing Cost (BHC) line, and the After Housing Cost (AHC) line (Department of Work and Pensions, 2016).

30. People are defined as being low income if they have an income that is below 60% of the median found in the FRS (Department of Work and Pensions, 2016). In the context used by the United Kingdom, social exclusion is defined as having some type of relationship with income (Department of Work and Pensions, 2016). The HBAI also standardizes the amount of income needed by family type, using a two member adult family as the standard (Department of Work and Pensions, 2016).

31. After these lines are produced, there are many different lines for different parts of the population. There is a HBAI that calculates the different depths of social exclusion children 15 and under face who live below the HBAI, as well as a separate pensioner's index, for pensioners defined as those who are eligible or have legal or common law spouse who is eligible for a pension, HBAI (Department of Work and Pensions, 2016). Both calculations feature a material deprivation component (Department of Work and Pensions, 2016). To be clear, the UK HBAI for the general population does not include a material deprivation component, but the indexes for the subcategories, seniors and children, do.

32. The material deprivation index used in for HBAI is different than the one used in the EU-SILC, as the material deprivation index for children contains 21 items, and the material deprivation index for pensioners has 15 items (Department of Work and Pensions, 2016). The HBAI also defines children as those 15 and under, compared to the EU-SILC that defines children as those under the age of 18 (Department of Work and Pensions, 2016). Households and families that do not fall into one of the aforementioned groups do not have a material deprivation index calculated into their HBAI (Department of Work and Pensions, 2016).

C. Ireland

33. Ireland's "Consistent Poverty" measure is a combination of their material deprivation index and their risk of poverty line (Callan et al, 1993). Their material deprivation index contains 11 indicators, and their risk of poverty line is defined as 60% of median earnings (Callan et al, 1993). Unlike the general HBAI (the HBAI that does not look at specific subgroups) Consistent Poverty incorporates a material deprivation component into the indicator.

D. Canada

34. Up to 2017, Canada's approach to social exclusion has been through its provinces' anti-poverty programs (Fortin & Gauthier, 2011). As Statistics Canada does not have a particular survey that measures social exclusion, several Canadian provinces constructed their own individual "dashboards" to measure deprivation based on information provided by different Statistics Canada surveys. A "dashboard" is a series or compendium of related indicators which can be used together or separately to describe a common phenomenon or concept.

35. The dashboards are created by first specifying what multidimensional poverty is. Second, by deciding on indicators they think best represents the type of deprivations people in their provinces face. They may choose to either use available data, or create a new survey to gather data in monitoring progress of decreasing multidimensional poverty, depending on their own definition. Possible indicators include low income, material

deprivation indexes, employment statistics, education statistics, health statistics and quality of life and neighbourhood satisfaction statistics (Fortin & Gauthier, 2011).

36. In 2009 exclusively, the Canadian province of Ontario added the Ontario Material Deprivation Index (OMDI) to their wellbeing indicators as part of their Poverty Reduction Strategy (Statistics Canada, 2009). The OMDI was conducted by Statistics Canada for Ontario only (Statistics Canada, 2009). The OMDI separated the idea of deprivation and income and interpreted a person as being materially deprived if they reported not having two of 10 predetermined items (Statistics Canada, 2009).

37. From 2009 to 2011, the national Survey of Labour and Income Dynamics (SLID) measured the same 10 possible material deprivations that were included in the OMDI for Ontario. These indicators were no longer available after the SLID was terminated in 2011.

38. In 2013 exclusively, Statistics Canada fielded the Canadian Survey of Economic Well-being (CSEW). The survey focused on material deprivation using 17 indicators to measure wellbeing, economic hardship, household income and personal income (Notten et al, forthcoming).

39. In 2017, Canada's federal department responsible for social policy announced a new national poverty reduction strategy for that country. The strategy was to underscore the multidimensional nature of poverty, reflecting the importance of health, housing, and food security in addition to income in promoting participation in society (Government of Canada, 2016).

E. Mexico

40. In Mexico, there are no direct measures on social exclusion, nevertheless there are measurements of multidimensional poverty. The National Council for the Evaluation of Social Development Policy (CONEVAL²), a decentralized autonomous body created in 2004 with the approval of the General Law of Social Development (LGDS³), is the responsible institution for creating such measures. CONEVAL establishes one of its central objectives as

... to guarantee the full implementation of rights established in the Political Constitution of the United Mexican States, ensuring all the population has access to social development (LGDS, as quoted by CONEVAL, 2010, pg. 17).

The LGDS (2016) indicates the goals of the national policy of social development the promotion of conditions that ensures individual or collective social rights⁴, as well as the enhancement of economic development.

41. In this context, CONEVAL (2017) established the guidelines and criteria for defining, identifying and measuring "Multidimensional Poverty" in Mexico, as mandated in the LGDS, taking into consideration the following indicators:

- Per capita income

² Its Spanish acronym

³ Ibid

⁴ i.e.: education, health, nutritious and quality food, housing, healthy environment, work, social security and those related to the non-discrimination terms included in the Mexican Constitution

- Average educational gap in the household
- Access to health services
- Access to social security
- Quality and spaces in the dwelling
- Access to basic services in the dwelling
- Access to nutritious and quality food
- Degree of social cohesion
- Degree of accessibility to paved road

42. In order to measure the insufficiency in terms of economic well-being, people whose incomes are insufficient to obtain the goods and services required for the satisfaction of their needs are identified. For this purpose, CONEVAL defines a line of wellbeing “La Línea de Bienestar” and a line of minimum wellbeing “Línea de Bienestar Mínimo”. “La Línea de Bienestar” considers the income required for the acquisition of goods and services to satisfy the food and non-food needs of the population. Conversely, the “La Línea de Bienestar Mínimo” focuses only on the amount required only for the satisfaction of food needs.

VI. ISSUES AND CHALLENGES

A. No concrete definition

43. Currently, there is no exact or widely accepted definition of what social exclusion is or is not, which makes it difficult to compare statistics from one source against statistics of another source. Some NSOs measure social exclusion with the addition of low income being a factor, while others do not include it, based on the view that low income is only a symptom of a person being excluded from society, and not the primary cause. With the exception of EU member countries that are measured using the EU-SILC, this large discrepancy in how NSOs define social exclusion makes cross country comparisons difficult.

44. This phenomenon extends to how employment is factored into the discussion of social exclusion. Some definitions of social exclusion dismiss the concept and its importance to measuring social exclusion entirely, while others believe that it is an essential part as it can examine the scope of social networks that can be exploited at work and creates a sense of community and belonging.

B. No clear measurement standards

45. These inconsistencies reflect the lack of current measurement standards on the topic across NSOs, with different NSOs creating their own methodologies that suit their own purposes. Different NSOs have tried either indexes or dashboard indicators, or both, in an attempt to measure the prevalence and depth of social exclusion. While none of these are inherently better methodologies of measuring social exclusion, it does make it difficult to compare how different groups are combatting social exclusion in their societies.

46. There has been movement towards conceptual and measurement standardization between NSOs in related subjects, although not always in a coordinated way. Now, many NSOs are likely to produce (or have produced in the past) a material deprivation index that is unique to the needs of the residents in their nation(s). Likewise, low income indicators

have become more standardised across countries over time. These, and other similar moves, allow for more discussion about how a country is progressing towards the goal of reducing social exclusion relative to other countries.

C. NSOs chose what measure as it relates to their mandates and their resources

47. NSOs do not have the ability to measure everything and therefore must make choices as to what they are able to measure and what they cannot, based on their country's priorities. These limitations can include smaller budgets compared to other NSOs, fewer staff members, and fewer other physical resources. The lack of resources NSOs face leads to international comparability being often overlooked for more immediate needs.

D. Competition from other multidimensional measurements

48. Differences in local capacities or interests result in NSOs choosing to measure different concepts. Distinctions between these concepts, like social exclusion, social cohesion, social inclusion, material deprivation or multidimensional poverty are relatively nuanced which can create confusion in their comparability, as well as make it difficult to measure each one individually.

VII. CONCLUSIONS AND RECOMMENDATIONS

A. Conclusions

49. Social exclusion is a rather loosely defined concept that has generally been understood as a way to assess a person's material and social deprivation, their lack of involvement in society and having a poor quality of life. However, the ambiguity surrounding the term has led to confusion as to what is included and not included in measurements, as the methodology changes based on what definition is used.

50. Eurostat's AROPE, the United Kingdom's HBIA, Ireland's Consistent Poverty line, and INEGI (Mexico) use indexes to measure the variation of social exclusion in their societies across years. However, there are underlying differences in the methodologies of these indexes. The United Kingdom's HBIA, EUROSTAT's AROPE and Ireland's consistent poverty line include people who have incomes below a certain threshold, while INEGI's does not. This is in spite of some definitions of social exclusion not including low income as a factor in social exclusion, rather a symptom.

51. Australia, Canada and ECLAC are examples of countries or organisations who have mostly focused on individual indicators or dashboards instead of creating social exclusion indexes.

52. The lack of a standardized definition and methodology has led to confusion as to what is actually represented in the statistics.

B. Recommendations for future work

53. This section on recommendations for future work is informed by the conclusions described above, as well as feedback received during consultations with representatives from multiple statistical organisations, as described in the acknowledgements.

1. *Clearly define social exclusion*

54. The purpose of this recommendation is to clearly define what constitutes social exclusion. As it currently stands, each NSO defines what social exclusion is in their country, and the standards can change over time. This fact makes comparisons across time, and across countries very difficult.

55. Feedback to this study generally indicated agreement with the idea that “social exclusion is an important topic for NSOs to collect data on”, although there was concern expressed about the costs of adding additional measurements to existing surveys.

2. *Examine methodologies to measure social exclusion*

56. The second recommendation is to re-examine current practices in terms of measuring social exclusion. The objective would be to prioritize a statistical method as to measure the prevalence, persistence and depth of social exclusion.

57. Reviewers of this study had mixed views on whether social exclusion should be measured as a single index or as a “dashboard” of indicators. The latter allows for more flexibility among countries to customise the measure to meet domestic needs.

58. Some reviewers of this study indicated a preference for using EU-SILC as a source for international harmonisation, given the (already existing) application of these data in many country contexts.

59. One reviewer indicated that administrative data on income, government transfer programs, housing etc. could be exploited for indicators of social exclusion.

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