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## *The sociological context of poverty*

„Poverty and exclusion can be not on any account tolerated in a well-off continent like Europe.”<sup>1</sup>

### **A sociological approach to poverty: opposing paradigms**

The sociological research on poverty, the theoretical and empirical knowledge accumulated contributes to identifying and interpreting poverty phenomena and - as a server of social policy – it takes an active role in actions implemented for the moderation of destitution, also in the elaboration, introduction of diverse social, social policy projects, and impact studies. In these fields the science of sociology mostly exploits functionalist and conflict-paradigms. Hereunder, the focus falls on these paradigms, the relevant theory of „poverty culture” by Lewis, the category of underclass, the mechanisms of social seclusion and the model of life cycle are also mentioned.

#### *The structural interpretations of poverty – functionalisms and conflicts*

Among the functionalist theories the most often quoted authors of the field of sociological interpretations of poverty are Davis and Moore (1997) who in their theory about social stratification set the focus on the types of social inequalities and the factors developing them. As they termed, society is mechanism in function which is entitled to distribute its members among social positions and to stimulate them to fulfill tasks associated with their own functions. To supplement their idea they noted that society needs to possess such „rewards”<sup>2</sup> that can be applied as incentives and such methods that allow the differential allocation of rewards to distinct positions. „In general, the positions that call forth the best rewards, that is occupy the highest rank a) are of the greatest importance for society and b) require the highest level of qualifications or talent” (Davis-Moore 1997: 13).

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<sup>1</sup> The notion of the European Economic and Social Committee, a proposal for decree made by the European Parliament and Council on the year of struggle against poverty and social exclusion (2010). COM (2007) 797 final – 2007/0278 (COD).

<sup>2</sup> According to the authors rewards can be categorized as ones that (1) directly contribute to subsistence and fundamental well-being, (2) promote entertainment and recreation, (3) foster self-esteem and self-realization.

Since societies are impelled to differentiate their members according to prestige and esteem, to some extent they must have institutionalized inequality. Consequently, those positions turn into the sources of poverty (low income and prestige) that are of hardly any significance for the society itself. As Spéder remarked, „those tend to become poor who do not own any specific abilities and skills, and are in charge of positions that could be filled by anyone else” (Spéder 2002: 20). The less influential and the easiest posts are located at the bottom of hierarchy and are the least rewarded. According to the theory, those are prone to live in poverty who can only fill low positions demanding less knowledge, time- and other investments. So, when searching for the causes of poverty low prestige and low rewards associated with low status have been detected.

Later in relation to the functionalist paradigm, in the context of the unfolding „underclass debate” Herbert J. Gans following the notion of the undeserving poor answers the question „what undeserving poor serve for?” in his study with functional orientation. As he explains, poverty can be studied and interpreted in terms of its positive and negative functions in society, while he rejects those theoretical ideas that claim „the roots of poverty can be attributed to the moral and intellectual inadequacy of the poor”. Criminal offences committed by the poor are mentioned among the negative functions of poverty, i.e. types of street offences and behaviors contradicting the norms of the middle-class. „Let me mention some examples: there are some who do not undertake any work, bear children as juveniles outside marriage, live on aids and become addicted to drugs or alcohol. I regard these patterns of behavior as ones resulting from poverty, as (either now or in former times) they have been closely attached to poverty and can hardly be detected, if at all, in non-poor classes As if to say, they are clear manifestations of destitution.” (Gans 1992: 1.)

In his study, Gans presents 15 functions or function sets of positive impacts that are supposed to fit the undeserved. When illustrating these functions<sup>3</sup> he shows the

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<sup>3</sup> Gans mentions the following functions: (1) The undeserved poor seem to be the reserve source of labour force, which is important considering that by them unemployment rates can be held at a high level to keep wages low. (2) Since not being well-qualified, they are thought to lack even the habits (eg. ethics of work) needed, so they are less offered work opportunities, namely they are excluded from the work force market. Due to this fact they are not presented in unemployment statistics, thus making indicators more „showy”. Their positions are replaced, for instance by immigrants who are willing the undertake jobs for lower wages in worse conditions. (3) They help to satisfy needs for illegal resources of the better-off, e.g. through drug trafficking. (4) They provide work opportunities for employees from the middle-class, e.g. for social workers, psychologists, trainers, police officers, judges, prison guards, as Gans noted, even for social science researchers who are committed to carry out investigations about them. (5) Thanks to them the institutional status quo can be maintained, regarding that some developments such as the improvement of the schools maintained for „the unteachable children of the poor”, the social building projects or the support system can be omitted. The failure of these systems has always been explained with the ignorance of the concerned, referring to the careless maintenance of their flats, their refusal to pursue any working activities. (6) The undeserved provide a moral ethos for the categorization of classes, if they are stigmatized as undeserved, all the others above them are considered as deserving. It is nothing more than the legitimation of class hierarchy. (7) Also in maintaining the social norms the undeserved

duality of the phenomenon; partly poverty is an end-product of the functional differentiation, partly it greatly contributes to the operation and legitimation of the existing society.

As for our theme, besides the functionalist conceptions conflict theories rooted in the doctrines of Marxist sociology have also been given a prominent part, which contrary to the prior put an idea into the limelight. According to it, processes ongoing in the world can be described by opposing and contradictory interests, therefore, society is not supposed to be a field of harmony but one of conflicts. The essential point of Wright's theory (1999) is that social inequalities are developed and maintained on the basis of dualities of exploitation and oppression, consequently poverty is regarded as a direct result of exploitation. In this sense, those can become poor who do not possess any properties of production that is they have no influence at all on the means of production. As Wright concludes, poverty is a consequence of the opposition between those in power and marginal groups of the society.

The fundamental distinction of the above two theories can be realized in the different interpretations of causes of poverty. According to the functionalist theory, the sources of poverty can be marked in the limited number of highly qualified individuals and diverse significance of positions existing in societies. By conflict theories the emergence of inequalities and poverty can be derived from exploitation. As their common segment on the one hand both conceptions acknowledge poverty as a result of structural relations, on the other hand their approaches are based on positions of the workforce market and employment relations, and none of them pass the formal spheres of work and capital (Spéder 2002).

According to Peter Townsend's (1991) conception regarding functionalism to justify theory operationalization would be required which is rather difficult, since „not only are collective bargaining and political actions ignored, but the fact that the power of interest groups and classes over sources proves to be diverse” (Townsend 1991: 191).

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play important roles. Those who meet the general norms can exploit them for „standing for these norms explicit and fight for their social reinforcement” so to keep the morality of the middle-class remain valid.(8) The undeserved can be stigmatized as scapegoats and become targets during conflicts to indirectly serve the interests of the political elite. (9) For media, mostly for television programmes the undeserved offer inexhaustible sources of themes, in „busy, never ending television reports” addressing murders and other offences the poor are the „stars”. (10) As clients they are available for supports provided by churches, religious institutions and political parties which set up for a hero longing for further benefits. (11) The existence of the left-wing is strongly determined by the roles of representing affairs of the poor and struggling against their status of being undeserved. (12) As the undeserved do not possess any political power, right-wing parties have always been ready to exploit them. (13) The undeserved can give a handle in critical actions to stand up against the welfare state. (14) They can be marked as scapegoats of the national conflicts, candidates of left-wing or liberal parties can be permanently criticized for supporting the undeserved thus questioning their own suitability for political engagement. (15) The derelict living environment of the poor can be utilized for settling those institutions there which are not considered as suitable in the environment of the better-off. These are shelters for the homeless, rehabilitation centres, dumpsites, not to mention police that are inclined to provide a „valve” for drug trafficking in these areas.

Another highlighted point of his critique is based on the issue of motivation. According to the theory, to inspire people to acquire certain positions higher financial reward and prestige are demanded. However, as P. Townsend claims the theory fails to remember the fact that motivation is a dependant on the cultural environment as well, so the desire for financial reward is less likely to be equally strong and important for everyone. He considers functionalism as a sociologically and politically „convenient” conception, because „rewards are suitable for hiding information that reveal inequalities, for the social elite the exclusive dissemination of over-generalized, ambivalent or highly selective information is a means of controlling the potentially disruptive power of inequalities” (Townsend 1991: 191).

All in all, the constellations of poverty and wealth are two schemes of great significance that help people interpret and understand the unequal distribution of advantages and drawbacks in societies (Csepeli-Kolosi-Neményi-Örkény 1992). In traditional societies, the interpretation of this duality was inevitable, as Csepeli and his colleagues noted, „it depended upon the schemes presuming the effects of the social causes”. In a modern society in which individual achievement is highly emphasized personal freedom and responsibility have become the focuspoints, thus individual factors have also played a part in who, how and why could obtain more advantageous or disadvantageous social positions.

#### *The culture of poverty, the underclass, social deprivation and the poverty of life cycles*

##### *The culture of poverty*

According to Townsend’s interpretation, „the terminology of the subculture of the poor were distilled from a sequence of ethnological, sociological and eugenical investigations” (Townsend 1991: 186). In its modern form it has been represented by Oscar Lewis (1988); according to Lewis the poorest strata of society establish an isolated and generally self-reproducing subsociety or subculture. This culture is claimed to have an important function by incorporating a life style and perpetuating it into the following generations. Apart from the general shortage, the economic deprivation and the inordinate conditions characteristic of poverty it reveals a way of life that absorbs a specific meaning, function, structure and defence system, all with the only aim of surviving poverty.

It claims that the culture of poverty can emerge in any historical situation, however, it mostly develops and flourishes in societies which meet the following requirements. „1. money management, wage labor and profit production; 2. persistently high rates of unemployment and low employment rates of the unqualified; 3. low wages; 4. lack of social, political and economic organizations established either unprompted or initiated by the government among individuals with low income; 5. spread of bilateral affinity systems instead of unilateral ones; 6. value system of the dominant class that attaches great importance to financial properties, wealth, upward mobility and economy, sees the roots of the unfavorable economic situation in individual inadequacy and

inferiority. The way of life having arisen in such circumstances among the poor is the culture of poverty.” (Lewis 1988: 95.)

Moreover, according to Lewis the culture of poverty is a kind of adaptation and response to the marginal situation of the poor. It helps them cope with the feelings of despair and hopelessness when it becomes clear that they are incapable of achieving success according to the values and goals of the majority.

The subculture can survive for long for double reasons. Partly, due to the pressure posed on its members by the majority and the structure of the majority, partly the subculture is able to establish self-invigorating mechanisms. As a main cause, a process can be identified which undergoes in the ideology, aspirations and personality of the children raised in subcultural circumstances. Because of all these, Lewis believes that the improvement of economic conditions does not necessarily lead to the elimination of the culture of poverty. The termination process can be seen as time consuming, just one generation does not prove to be enough, so in terms of its concept „it is easier to put an end to poverty than to the culture of poverty”.

Lewis aims at proving that the way of life characteristic of the poor strata carries values that are not at all inferior only different from that of the other classes (Bokor 1987). In the 1980s these thoughts reemerged due to the so called debate of the underclass, though accentuating other issues and bearing more potent structural embeddedness (Spéder 2002).

#### *Underclass – another stigma of the undeserved*

The term underclass was created by Myrdal (Domanski 2001) to describe or characterize those individuals and families, which entered extreme living conditions and total economic marginality or were pushed into such circumstances. The term has been used since the 1980s in the USA where the term refers to a form of ghetto-poverty in urban areas, though it has proved to be greatly disputed in the literature of poverty. Authors investigating the themes of the underclass all agree on who are considered to belong to this group: those who take the position under all other classes or strata, are underqualified or undereducated, and are poor in terms of their income. When quoting Wilson Spéder taxatively lists the groups of which members are believed to form the underclass: „... *the poor permanently or almost exclusively living on social allowances; the unemployed young who do not attend or are excluded from school; still working-aged but unemployed men who having fallen out of reach of unemployment benefits and given up hope do not search for jobs; those with incomes from illegal activities not possessing permanent, legal jobs; mothers formerly not having had jobs who raise their children alone without a spouse or a partner; the seriously addicted (to alcohol, drugs); the aggressive young forming gangs; the criminals, the homeless etc.*” (Spéder 2002: 30.)

They are excluded from the traditional system of stratification and have no relation at all (neither economic, nor social) with the majority belonging to the non-poor. They form the stratum under classes.

In the American literature the term is discussed according to two separate approaches. In Silver's view (1996) the reason for this is the fact that right-wing political parties have turned the term to their advantage, the media have referred to it as the stigmatizing practice of the above thus converting the term of underclass into an ideologically moralizing one.

The liberals have approached the term from the perspective of the social structure. They propose social allowances for those permanently out of work to avoid the dangers of social-spatial segregation. The conservative approach is behavior based claiming that those who belong to the layer of the underclass can be characterized by a diverse (deviant) pattern of behavior different from that of the majority of the poor, which is the culture of poverty in itself and also the origin of their destitution. Domanski (2001) when citing Charles Murray emphasizes that the poor can be regarded as victims, "those who have been raised without a father and have been socialized in a counterculture in which education and work are of low prestige, are basically programmed for a failure." (Domanski 2001: 40). As two further reasons for the development of their poverty the social services are mentioned, which by the means of providing financial support get the concerned out of the habit of working. „*We have practically altered the rules concerning the poor. In a nutshell, we can state that »It is not your fault that you are poor. If you do not study at school, it is so because the educational system is prejudiced against you. Should you commit a crime, you are forced to do so by your unfavourable conditions...« Finally, after exempting everyone from liability we claim that »...you can live without being involved in the affairs of the social world as your parents could.«*” (Domanski citing Murray, 2001: 42.)

Along with the particular way of thinking typical of the cultural theories, the culture of the poverty is presumed to be a deviant culture and that is the reason why individuals and families are enclosed in destitution. As Murray noted, they are supposed to be pathological families, which owe their existence to the helpful attitude and goodwill of the society, and supports from the welfare system are seen as reliable for the reproduction of the underclass. From his perspective, the decline of the institution of marriage can be observed among the poor; for women the unmarried men are not seen as attractive partners due to the lack of their discipline, that is they would not be able to support the family because of their unemployed status.

While Murray (and other followers of the cultural theories) sees the causes of deprivation in the attitudes and behavior patterns of the poor, by the followers of the structuralist approach poverty is seen as a severe organizational-operational malfunction of capitalism. They regard the class of the poor to be so heterogeneous and to have a changing category of classification that it does not and cannot have its own independent culture and identity.

The Hungarian usage of the term can be characterized by extraordinary cautiousness and reinterpretative tendencies. Right after the change in the political system Zsuzsa Ferge in her work entitled „The society of transition” (1995) asked the question if a „dangerous and threatening” social group living in poverty and deprivation could form in Hungary, one similar to the strongly alive in the USA. According to her only „uncertain and cautious presuppositions” can be taken regarding the fact that the

roots of the American underclass show substantial differences from the European features. As she wrote, a backward tendency, a type of seclusion from the society could be detected in Hungary as early as the 1980s, which resulted in the establishment of new forms of disadvantages such as unemployment, open homelessness, a rise in the number of people with low income and a sudden increase in the proportion of individuals living on social allowances. To all of these factors uncertainties of life and unpredictable future were added. The social distance between the poor and other layers of society started to increase that is a progress of fallback emerged, though at that time it could not be foreseen if the underclass or the class under existence as Zsuzsa Ferge called it would come into being. In her view it depends on „*how persistent unemployment would be; how much protection the employed would have; what training form would replace the mass secondary education previously represented by vocational training; to what extent the educational system would expand and improve or narrow and deteriorate; how broad the scope of the social allowances would be; what conditions would be set for the allowances; how the poor or the impoverishing families could maintain their relatively acceptable homes; or to what extent dual systems could gain ground in health care system, education or in other fields meaning a good-quality service for the better-off and one of low quality for the rest*” (Ferge 1995:13).

Besides all these, the new ideology emerging after the change in the political system and the leaders with economic and political power fulfilling their own interests all reinforced the establishment of the underclass strongly intensified by the Roma issue. There were concerns that the tendencies for disadvantage would worsen, and as Ferge noted „the distinct isolation of the underclass needs time, though it might as well accelerate in this situation” (Ferge 1995: 14). Spéder (2002) when quoting Smith adds that the term became thematized in the European sociology by the 1990s, along with the conception of „exclusion” which had been a major concern in France referring to the multiply disadvantaged groups of the poor excluded from the living conditions of the majority. In a few years the term developed not only into a research issue but a political program in the European Union, and also surfaced in common talk displacing (and impeding) underclass, the term with highly arguable values.

*Social exclusion and „the medley of those living in marginality”<sup>4</sup>*

From the end of the 1970s the term „exclusion” was drawing increasing attention and was gaining ground in France, then in England<sup>5</sup>, and was used for defining a new, modern form of poverty (Havasi 2002). Later the context of the term was greatly modified and broadened, and it became well-known throughout Europe when in 1985

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<sup>4</sup> The expression is used by Robert Castel in one of his studies: *De l'indigence à l'exclusion, la désaffiliation, précarité du travail et vulnérabilité relationnelle*. In Jacques Donzelot (ed): *Face à l'exclusion. Le model français* Edition esprit, 1991

<sup>5</sup> Amartya Sen adds that there used to be a term which had referred to deprivation before the appearance of the term „social exclusion”. Deprivation is considered as a pioneer term of its kind; the term was created by Adam Smith (1776) unfolding „the inability to appear before others”, so it refers to a difficulty that can be experienced by someone deprived when joining community life. (Sen 2003b).

it was introduced by experts and specialist committees representing the European Union. Several researches started with a focus on social exclusion.

In clarifying the term, Atkinson played a major role who while investigating the sociological terms used in different countries with his colleagues distinguished three constant or recurrent categories which served as definitions for exclusion, though they did not recognize any conceptual overlaps. The three categories come as follows: relativity, activity and dynamics (Atkinson 1998). Relativity means that the investigated situation best reflects the particulars of the society, the time and the environment, that is the excluded individuals are to be correlated to the circumstances in which they live. Moreover, Atkinson tends to believe that exclusion is rather an attribute of a social group than that of an individual. Activity as another characteristic feature of exclusion reveals the fact that exclusion always derives from series of activities. In this case the doer and his actions are regarded as the most important, and as Atkinson adds, „in case of integration disorders not only the circumstances of the concerned are to be taken into consideration but also the extent of their reliability” (Atkinson 1998: 8). The third factor, dynamics represents the correspondence that individuals can be excluded from society because of being out of work or being childless and also owing to losing their faith in their own or their children’s future, thus integration difficulties may as well span into the following generations.

Amartya Sen’s (2003b) interpretation shows differences, he approaches social exclusion from the utility of the conception, so he aims at revealing whether the notion has brought on anything new if compared to the former ones, whether it has had any increments, if any, of some significance. He means to find out if there are any elements of the conception which could contribute to the better understanding of the nature of poverty. According to Sen (in accordance with the oldest interpretation), poverty equals lack of income which seems to be relevant in the topic because income makes a tremendous impact on the lives of individuals. He identifies the cause of „impoverished life” with insufficient income, thus low income proves to be a fundamental source of poverty. That is why poverty needs to be investigated from the features of miserable life, not from the perspective of low income. He aptly notes that ”impoverished life calls for attention not only empty wallets” (Sen 2003:5), for income is one of the major means of balanced life devoid of deprivation.

Amartya Sen’s theoretical approach evaluates poverty as a condition deprived from opportunities and proves to be a multi-dimensional, by his own admission an „Aristotelian” conception. The essential message of the Aristotelian perspective (basically conceded by Sen) claims that „impoverished life lacks the freedom to take part in intrinsic activities that are to be chosen for good reasons” (Sen 2003:5).

He accepts the necessity approach of Adam Smith purporting to define the requisites influencing individual freedom and providing destitution-free life. In the core of the Smithian idea of „being ready to appear before others” deprivation can be recognized which absolutely plunges people into poverty. According to Sen „*Smith focused on the ideas of integration and exclusion while analysing poverty, and when defined the nature of »necessities« indispensable for a decent life: »By necessities I not only mean those material needs which are supposed to be means of sustenance, but the shortage of those resources that are considered to be unacceptable by*



*the customs of the country even for the lowest ranking ones worthy of respect [...] Leather shoes are seen as essentials of life according to the customs of England. Even the poorest female or men could not avoid the shame when appearing in public without them».* (Sen 2003: 8).

Sen applies the Smithian approach of deprivation to model how exclusion from social interactions – i.e. deprivation from community life – is connected to social exclusion.

In the Hungarian literary sources Zsuzsa Ferge (2000) finds the benefits of the term in its competence to demonstrate not only the reality of material deprivation and poverty, but the complexity of the problem involving the fact of being excluded from various sources, activities, opportunities and rights. Although poverty is seen as a passive almost self-existent category of which existence is said to be nobody's fault, there is another especially useful aspect of the mechanism of exclusion, for it manifests that certain social groups or processes more or less, but consciously function in a way which leads to the exclusion of individuals or other groups. Ferge adds that *„there has been a strong need for the term of social exclusion for several reasons. It has been suitable for introducing the phenomenon of poverty as a complex and dynamic one with an accumulation of disadvantages, not as a situation of (permanent or temporary) financial shortage. It has slowly become a comprehensive term that includes the factors jeopardizing social cohesion, the marginalization, and the processes generating exclusion. On the contrary, the term of inclusion communicates social incorporation, namely cohesion.”* (Ferge 2007: 8.)

The term can be variously interpreted, as on the one hand in Ferge's reading it is *„absence of participation in main fields of social life”* (Ferge quoting Burshardt, Ferge 2007: 8), on the other hand as a cumulated form of deprivation it directs attention to life chances, blames the shortage or low standard of the available resources and capital, on the third hand it appears as a contrast to a society of *„high quality”* (i.e. adequately integrated). As she says through *„the many faced social fragmentation”* ghettoisation and segregation develop invincible distances and obstacles between the excluded and the others.

Since the description and measurement of the objective relative deprivation term of Peter Townsend, the investigation of the aspect has gained great significance which claims that poverty is not simply a lack of income, it rather says that individuals or families may be excluded from activities socially considered important due to the shortage of resources. Zsuzsa Ferge (2002) summarizing Miller's conceptions makes obvious that *„those shocked by poverty all know that the poor suffer not just because money is tight. Financial shortage brings on misery, humiliation, social rejection. So there exists an interpretation for poverty equivalent to exclusion, no matter what the latter means”* (Ferge 2002: n.p.)

To the question whether poverty in a broad sense differs in meaning from exclusion, Zsuzsa Ferge answers the following: *„basically it is all about the same social phenomena, hardship, deprivation, the forced constriction of the horizon, desires and choices not voluntarily restrained”* (Ferge 2002: n.p.). In her view, the reasons for the widespread use of the term exclusion are less academic than political in which the more current themes of *„ethnicity-minority-migration”* are included.

In addition the social psychological impacts of exclusion cannot be ignored, as it reflects a state out of society that is not *„pure”* relative poverty, but a condition in

which individuals are deprived of every straw that assures them links to society. In such a situation the experience of belonging to society ceases to exist that can on no account be substituted for financial resources.

#### *Life cycles and poverty in life course patterns*

The phenomenon of life cycle as a source triggering poverty was formulated in England as a result of empirical investigations. At the turn of the 19th and 20th century after having carried out researches among working families it was discovered that married families went poor following the birth of their children, though after the children grew up and became employed the family emerged from the state of poverty. However, when the children found a family and leave the nest with their parents growing old, a new phase of poverty is introduced into their lives. The phenomenon has been supplemented by further findings that reveal various demographical events (e.g. divorce, becoming widowed, high number of children) which may lead families below poverty line. It is well illustrated by the conclusion from Márton Medgyesi, Péter Szívós and István György Tóth „According to the former researches the poverty rates prove to be higher in families with at least three children, or when the head of the household is younger than 40 years of age or a single parent. When householders are aged between 40 and 60 less distinction in household types can be detected, although single parent families or families with at least three children are more likely to be poor. Families with elderly (more than 60 years old) householders are the most likely to become pauper especially when the aged person lives alone.” (Medgyesi-Szívós-Tóth 2000.)

The individual course of life is highly affected by the cessation of the conventional relations and social frames which are then replaced by „secondary forums and institutions” strongly defining individual life. As for individualistic developments Beck states that „even if an individual believes to be his own man he proves to be a toy in the hands of fashion, relations, prosperity and markets” (Beck 2003: 239). Consequently, he maintains that class-culture dependant or family lives are overlapped by or changed for so-called institutional life patterns manifested in entering and leaving the educational system, then employment, specifying retiring age in social policy, everyday schedule and time management. The overlap seems to be typically clear cut for „normal lives” of females, while male lives tend to be fully untouched by events of family life, female existence experiences a duality manifested in a family and institutional life (Beck 2003).

A special attention is to be given to Péter Somlai’s (2000) conception of „four-generation relationship structure” which points to an increase and elongation in the life duration of certain generations in the 20th century that together with economic, social and cultural factors have generated major changes in phases of family lives, mostly in lives of elderly family members. Thus, the post-parental stage of family life has become longer which is named by the sociology of the family „an empty nest”. In this phase grown-up children abandon their home leaving the parents alone. This

stage of life did not even exist about a hundred years ago, but recently in developed countries it can persist for 20 years or longer. However, it does not mean that from that on parents only concern about themselves. In the first phase of this life stage most of them become parts of the so-called sandwich generation, for they keep on supporting their offsprings in getting and furnishing their own home, founding a family, then in raising grandchildren meanwhile caring or supporting their own old parents. That is the reason why the sociology of the family speaks about the relationship structure of four generations, since each generation highly demands family support, albeit for different reasons.

### **Call poverty its name: changing paradigms, changing thematizations**

Poverty as a complex phenomenon can be thematized and defined in various ways. According to the above theories poverty is to be handled as social reality which is not a pure objective condition, since as a whole it is a social construction established by members of a community. Any terms for defining and interpreting poverty have their own social history and are closely linked to the political, economic and social developments in which they were brought into being and in which researchers exploit their favored (paradigmatic) terms as means, let alone their commitments (Silver 1996). In addition, poverty and its manifestations could hardly be interpreted without their social environment. We might as well say that the paradigms elaborated for handling poverty and the terminology are directly determined by the culture of politics, the dominant ideology of social organization and the objectives of social policy.

To give an accurate explanation is rather complicated for which the above mentioned relations provide sufficient explanation. It is not extraordinary at all that at the same time there are several parallel conceptions for poverty, or as Spéder (2002) notes no neutral conceptions seem available as equally universal and objective ones. As many definitions are used, as many types of poverty coexist.

Of course, there have been scientific theories about poverty, even if not so comprehensive and thorough they are. The treble principle system of Peter Townsend's (1991) theoretical typology is based on precepts on social structure, employment status and the rewards of the former ones. In such a context did the researcher develop the general principles of (1) conditional help provided for a few, (2) minimal rights for many, and (3) distributive justice for everyone. The difference of these are manifested in the types of interventions and policies applied while handling poverty.

Townsend models the precept of conditional help for a few through the poor laws of England and by the logic of the elite on poverty in the 19th century. As for the upper class the existence of the poor was nothing else but something of social necessity, and for them the problem was not the fact that the poor were deprived of financial resources, but the moral deficiency they lived in (they called it pauperism), the elite perceived individual shortcomings such as lightmindedness and intemperance as factors that make people embroil into poverty. In this context did the formerly

mentioned categories of deserved or undeserved status emerge, and as the elite believed that at that time by poor laws poverty could be cut down to a minimum in England, accordingly their policies of conditional help fundamentally addressed a narrow layer of society. Those could obtain the deserved status (or were morally evaluated as virtuous) who worked or who despite being unemployed and having crucially low income could justify their availability for work.

In his economic policy oriented work Polányi (1976) well illustrates the approach to poverty typical of the era. He refers to two theoreticians whose conceptions best reflect the essentials and ultimate goal of the principle. One of them was called Joseph Townsend, whose works and thoughts set the ground for the oeuvre of Malthus. In his famed piece of work, *Observations on the Poor Laws* he labeled poor laws as remnants of the Elizabethan era and (together with other contemporary authors) he suggested the abolishment of the laws and urged to force the poor to undertake work for any wage. In his view, the allowance provided for the poor was an artificial intervention into birth rates, which consequently posed burdens (referring to food supplies) for others. He believed that due to the artificially induced increase in birth rates among the poor others' life would become shorter.

According to J. Townsend cutting off the allowances provided for the poor would automatically resolve the difficulties of poverty, as famine would get them to work for the least available wage, so their numbers would be exclusively regulated by those who would be able to acquire the amount of food needed for survival. As a result, there would be no need for administrative pressing, as the power of the survival instinct would pressurize the poor to participate in production procedures.

These thoughts have gained reputation due to the works of Malthus who was the other theoretician mentioned by Polányi. According to Malthus, famine becomes established in human societies because of the existence of an enforcing natural power, namely sexuality. Owing to the sexual instinct, the number of people is always confronted with the limits of food supplies, that is if more children are born than food supplies are capable of keeping, the surplus will be swept away by wars, epidemics, crimes and famine. That is how nature works, it takes sanctions that no government can ever alter. It well presents the social attitude characterized by the essential idea that the poor can be legally excluded either from communities, even from life under the auspices of the principle of undeservedness.

The recently generally acknowledged principle of social policy elaborated by P. Townsend for the depiction of the early 20th century focuses on assuring the guaranteed minimal condition of existence for each member of society. The innovative idea of the Webb couple on the national minimum became widespread known in that period. Later the precept of the minimal rights for many got into public thinking due to the Beveridge report (1942). It was typical of the poverty conception of the mid-20th century that it considered poverty as a minority issue involving those excluded from work or are unable to work. These people got into trouble not because of their own faults but rather their misfortune, and in the absence of income they were not able to meet the basic needs inevitably required for survival. The issue of

minimal responsibility taken from the state was raised, and a claim was pronounced to provide a moderate supply for every citizen in need through government policy.

The third principle, the issue of the distributive justice concerning everyone seems to be somewhat theoretical assuming that the society deprives the poor of the chances to join the activities and pleasures commonly within reach. From a political aspect, the conception can be characterized by the principal aim to modify the actual hierarchic social stratification, partly through economic, political and social reorganization, partly via a more equal distribution of power and financial resources.

The diversity of further discussions on poverty are generated by the various approaches to the nature and extension of poverty and by ideas about social inequalities, different in each society, not to mention the evaluation of permanent unemployment. All these follow a scheme of modernization. The heterogeneous views and attitudes to poverty in social history imply technical differences as well, manifested in the use of indicators for the illustration of the phenomenon, moreover, the differences shown in the diverse practices of social policy and the varying principles of social philosophy supporting social policy can be not on any account ignored. We can conclude that poverty is measured, interpreted and called in a different way in every country in accordance with the current social reality.

*It depends on how it is called...- some methodological aspects of measuring poverty*

*Peculiarities of poverty lines*

The expression „living on minimal income” introduced by Éva Havasi (2005) has drawn attention to the problems of income poverty<sup>6</sup>. The rate of those receiving minimal earnings can be determined in several ways, and no matter which alternative is chosen, a threshold value is used to identify the poor. The identification can happen in an objective absolute or an objective relative, or either in a subjective way. Among the objective absolute threshold values for poverty the most well-known and most commonly used one is living wage. According to KSH (Central Office for Statistics) (2007) living wage means the limited circle of resources demanded for keeping elementary „physical condition” and „social well-being”. As such „living wage is by no means the limit value for survival but an amount of money that expresses the value of the quite moderate needs of everyday life seen as conventional in numerical data. It communicates the numerical value -set at a price floor- of consumption goods belonging to »social well-being« over »physical condition«.” (Létminimum 2007: 2.)

Another kind of absolute poverty lines follows a method of measurement different from to the logic of income distribution, it pre-determines the poverty line in a fixed amount. For some years the World Bank has been using the sum of \$4,3 per head for

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<sup>6</sup> In her study „Income as an index of material welfare and poverty” Éva Havasi (2005) goes into details and demonstrates what he means by income and what part it plays in measuring welfare.

Hungary to determine the poverty threshold in international comparisons. If this method is applied in comparison with the relative threshold value, the number of the poor tends to become approximately tripled, thus these calculations produce similar or even worse results than calculations made with the national minimum of subsistence.

The conceptions that build upon the relativity of income poverty always compare individual well-being to the average standard of social welfare (Spéder 2002). Among the researches for the objective relative approach to poverty, according to a study conducted by OECD the threshold value of poverty tends to be approximately 66% of the national income per capita, that is 60% of the national average income as stated in a study by the European Council. These studies demonstrate that poverty threshold is always a dependant on the average standards of societies (Létminimum 2007). In a different approach poverty line can be determined in the 50% or 60% of average or median income. This method seems to be suitable for making international comparisons for *„it is accentuated that [...] poverty is a distance measured from average conditions, backwardness if compared to the average standard of social welfare. Therefore, social groups principally exposed to the risk of poverty can be well circumscribed, and the view maintaining the dependence of the extension of poverty on national income diversities proves to be valid. Those declaring that this approach is appropriate for the demonstration of social inequalities are right.”* (Spéder 2002: 245.)

As a result of the dissatisfaction with poverty conceptions based on disparity in income, investigations on deprivation have contemporarily launched (Spéder quoting Townsend, Spéder 2002), which have set off from the complexity of individual and family life conditions. These deprivational conceptions emphasize that individual conditions do not exclusively reflect income, but life circumstances, lifestyle, tendencies for consumption, and last but not least individual aspirations. The stratification studies carried out in the 1980s in Hungary were conducted accordingly, the results of which were published by Ágnes Bokor in 1985 in her work entitled *„Depriváció és szegénység”*. She examined family deprivation and interpreted relative disadvantage, work, lobbying, material consumption, residence conditions, lifestyle and state of health through six dimensions.

Subjective threshold for poverty is another representative term based on the evaluation of individual and household income status as a form of self-reference. (KSH 1999). Its level is a dependant on numerous factors, since the actual individual income and its extent are highly affected by the beliefs about income inequalities, the past situation of the individual and the family, and also by their future prospective. As a form of subjectively measuring poverty, individuals give self-reflections about themselves and their financial conditions. According to this method those are considered to be poor who admit themselves poor. Another technique invites households to estimate the cost of living required by similar households to be able to function at diverse levels of existence (very straitened, straitened, average, good, very good) (KSH 1999).

As Zsuzsa Ferge (1985) notes subjective deprivation *„rather tends to be a source of tension”*, as it gives a reflection about the social state of mind while focusing on developing requirements for changes. Anyhow, these demands do not necessarily

denote the most severe problems objectively, that is why „*a policy aiming at fundamentally altering social relations ought not to pay attention only to current tensions but also to articulating demands. Among the groups especially in need, there is an absence of means to call attention to themselves and to stand up for their interests, however, the improvement of their situation is also an inevitable part of the reformation of the whole social relation system.*” (Ferge 1985: 49.)

The official term used for poverty threshold as highly significant for our topic is determined on the basis of the minimal standard defined by governments. In Hungary poverty threshold has not been officially determined, though for fixing the amount of social allowances the minimum of the old-age pension has been taken as a quasi-official extent.<sup>7</sup> According to Éva Havasi's calculations for the past few years the level of the old-age pension minimum has developed in an interesting way if compared to the values of other poverty thresholds. During the early years after the change in the political system, from the mid 1990s to 1998 the extent of old-age pension minimum coincided with the lowest income level of the lowest earners, and to some extent it has even exceeded the latter, though later the measure of the old-age pension started to lag behind the rest of the investigated poverty thresholds. It was no longer able to keep up with neither living wages nor with the subjective threshold value, that is to say with the level of income minimum considered essential by the population. In 2003 the greatest secession took place between old-age minimum and other subsistence thresholds in a way that „old-age pension was the 80% of the threshold level in the lower tenth, according to the public opinion 66,5% of the minimum amount needed for a very straitened living, that is 55% of the living wage minimum per capita calculated by KSH.” (Havasi 2005: 20).

In this period approximately 5% of the population lived under the threshold level of old-age minimum, 31% under the living wage minimum and 18% under the subjective poverty threshold.

#### *Continuity and transition: the schedule of poverty*

As for the present paper, the distinction between permanent and transitional poverty is of special significance. As the formerly demonstrated theories have shown, both categories are presumed to imply various reactions, lifestyles, evaluations, possibilities and conclusions if considered either individually or socially. It is essential for us to highlight that deep poverty refers to those who persistently live in need. The situation of the transitional poor is considered as actually „transitional”, so they do not tend to fall in poverty so deep from which they would not be able to arise. Mostly the situation of those in persistent poverty can be characterized by social exclusion, and in certain context according to some authors this group also belongs to the underclass. In many authors' view a manner of living is supposed to be peculiar of persistent poverty which basically differs from the life of the majority and the life of the poor living in transitional poverty.

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<sup>7</sup>In 2009 it was 28.500 HUF.

After all, the question arises: how to define the categories of persistence and transition, and where to draw the boundary between the two. Starting from Zsolt Spéder's researches (2002) it seems to be obvious that the answers to these questions are not easy at all, as he writes partly because the rate of the population in each category depends on the length of the observation period. In the international literature, there are several approaches to the determination of the length of the observation period applied for measuring persistent poverty. Spéder refers to two practices, partly those have been found to be persistently poor by researchers who live eight years out of the observed ten in poverty. According to the other approaches, it has been concluded in the course of the investigation for the likelihood for emergence that the chances of those having lived in poverty for more than three years start to decrease radically. Zsolt Spéder lists those among the persistent poor who lower under poverty threshold at least four times in six years' time.

When making distinction between transitional and persistent poverty Júlia Szalai (2002) finds it essential to distinguish income-subsistence poverty from the condition with multiple handicaps (she calls them people in deep poverty, lagging poor or the excluded). In her view in the background of subsistence poverty „simple” problems of distribution can be revealed. In these cases, the incomes earned in different fields of employment persistently lag behind the price level of daily consumption or incomes from social insurance lose their values. These deprived groups have been still seen as segments of the majority, since the more their income improves, the more stable their life conditions will be, which enables them to return to the spheres of society dominated by the majority and to social scenes to the edge of which they have been pushed.

The situation seems to be different for the actual victims of exclusion, who either have not had any relations to help them reintegrate or, if any, they have lost them. A common feature of the life of the excluded is that they are likely to have a long prehistory of their poverty, often decades, and the extent of their destitution is extreme, often deep to the level of destitution (Szalai 2002). Life relations can be illustrated by common peculiarities: „...*their social relations basically involve those in similar circumstances, their children attend the same class as other ill-fated children, their families dwell together with other families in distress in ravaged housing estates, in abandoned farmhouses or in arbitrarily occupied backyard huts, their ill parents are sitting with other miserables suffering from handicaps or illnesses in temporary dilapidated medical centres at the end of villages for hours to get access to »general medical prescriptions«; they queue up in the human trade market of illegal employment with other defenceless fellows never obtaining a »decent« job...*” (Szalai 2002: 42.)

Consequently, their psychic and physical resources are exploited to the extent that they get unable to arrange their lives unaided even if they were offered secure and permanent employment, because without proper means their existential come-down and marginalization cannot be halted. In addition, as a typical feature of transitional poverty, but not of persistent exclusion the miserable life circumstances are passed on through generations which then come to stay for the younger generations on the long run.



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