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inclusiveness index

*Measuring Inclusion
and Marginality*



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The Haas Institute for a Fair and Inclusive Society at UC Berkeley brings together researchers, community stakeholders, policymakers, and communicators to identify and challenge the barriers to an inclusive, just, and sustainable society and create transformative change. The Haas Institute advances research and policy related to marginalized people while essentially touching all who benefit from a truly diverse, fair, and inclusive society.

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This project was inspired by and developed under the leadership of **john a. powell**, Director of the Haas Institute for a Fair and Inclusive Society.

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SUPPLEMENTAL CONTENT AND DATA

Additional info on methodology, case studies, maps, videos, infographics, and the entire data set is available at haasinstitute.berkeley.edu/inclusivenessindex.

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Introduction

We are pleased to introduce our first annual report of the Haas Institute **Inclusiveness Index**. In a complex and diverse world, with more data than ever before at our fingertips, how do we make sense of it all? What does it tell us about our societies and how we can do better?

Our new tool draws upon the latest datasets to holistically measure the degree of inclusivity or marginality experienced by different groups across societal settings and social cleavages, such as gender, race/ethnicity, religion, disability, and sexual orientation.

Though many multi-dimensional indices have been developed by other organizations, such as the United Nations Development Program's Human Development Index (HDI), the Haas Institute **Inclusiveness Index** is unique as a research tool to measure inclusion¹ of underserved and marginalized groups within our society—nationally and internationally. And while there are many excellent equity indices that examine and attempt to measure well-being in particular,² the **Inclusiveness Index** is uniquely focused on the degree of inclusion and marginality rather than a more general assessment of group-based well-being.

Inclusivity entails greater access to power and public and private resources, and improves the way society views group members. Inclusivity is realized when historically or currently marginalized groups feel valued, when differences are respected, and when basic and fundamental needs and rights—relative to those society's dominant groups—are met and recognized. Our **Index** focuses on social groups rather than individuals or even communities, as marginality often occurs as a result of group membership.

The goal of the **Inclusiveness Index** initiative is to identify policies, interventions, and other levers that have proven effective at ameliorating marginality and promoting inclusivity, belonging, and equity. The **Index** is a diagnostic instrument intended to help us pursue that goal by illustrating how different regions, states, and nations fare relative to each other in terms of inclusivity and marginality.

The Haas Institute is holistically focused on the processes of "Othering" and marginality that share common structures and features, as we are most concerned with the forces that engender inclusion or marginality across multiple social cleavages.

In this report, we rank nation-states according to a core set of indicators, as well as all 50 states within the United States. We then delve behind the data in our findings and themes sections, and surface deeper insights on notable trends and patterns, such as the global migration crisis and rise of extreme and toxic economic inequality.

Our rankings are not the final word on inclusivity nor a definitive assessment of any national or state performance, but intended to spark a conversation and generate further inquiry into how and why some places, communities, and nations are more inclusive than others.

All information and complete downloadable data files are available at haasinstitute.berkeley.edu/inclusivenessindex.

Inclusiveness Indicators

Developing an index that is capable of measuring inclusivity and marginality across many of the full range of human differences is an immense challenge. Our **Inclusiveness Index** attempts to meet this challenge by selecting universal indicators that reflect group-based marginality in any context. In addition, the **Inclusiveness Index** relies on datasets for those indicators that can be measured across a range of social groupings.

In developing this **Index**, we were guided by the conviction that multi-factor indices paint a more vivid portrait of underlying structural conditions and forms of advantage and disadvantage experienced by marginalized groups than any single indicator, such as poverty or per capita GDP. Single indicator metrics fail to capture the myriad of inputs that shape individual and group life chances.³ As a multi-factor index that incorporates six core indicators of inclusivity, each indicator is given a pre-assigned weight within the **Inclusiveness Index**.

Another practical criterion for inclusion was that each indicator had to be scalable to the global level. Developing a global country ranking would not be possible if similar data sets did not exist for a sufficient number of countries to justify a global ranking. Not only are there a multiplicity of measures across nations for similar information, but some countries track and collect datasets that others do not. We were also limited by data sets that were commensurate or comparable across geographies and national boundaries.

Finally, we wanted our indicators to reflect cultural norms, policies, laws, and institutional practices rather than economic strength or tax base capacity. Otherwise, any measure or ranking of inclusivity risks becoming a function of national wealth. In the **Inclusiveness Index**, the poorest nations on the planet are capable of faring best in terms of inclusivity, while the wealthiest are capable of faring the worst. Insofar as possible, the indicators are non-economic, and not proxies for governmental expenditures or investments in human capital, but rather reflect legal and institutional regimes.

In reviewing the range of possible indicators for our **Inclusiveness Index**, we ultimately selected the following domains that we believe reflect the inclusivity or exclusion of marginalized populations. Within these domains, we selected indicators that measure how various demographic subgroups fare, including: gender, LGBTQ populations, people with disabilities, and racial, ethnic, and religious subgroups.

OUTGROUP VIOLENCE

Outgroup violence is a direct indicator of group marginalization and oppression. Disproportionate violence suffered by discrete social groups reflects animus towards those groups as well as group vulnerability. For example, in the United States, lynching of African Americans in the early twentieth century or assaults on LGBT people in more recent decades reflects both animus as well as vulnerability. This is also true internationally, where ethnic or religious conflict may result in violence and fatalities, with genocide being an extreme expression.⁶

POLITICAL REPRESENTATION

Political representation and the extent to which citizens are able to participate in governance is another strong indicator of group-based marginality or relative inclusion. In democratic societies, ethnic, racial, or religious majorities are capable of outvoting minority groups in electoral politics. This can result in under-representation of minority groups. Similarly, if certain groups are marginalized within a society, even if they are not a numerical minority, we might also expect members of those groups to be under-represented in electoral politics. If members of certain groups, such as women or religious or racial minorities, are consistently under-represented in elected groups, that is often suggestive of marginality. Although there may be limited choices ideologically or between political affiliation and party membership in some nations, there may still be a choice among social group membership. Political representation among appointed representatives is less indicative of marginality because majorities lack direct say.

INCOME INEQUALITY

Group-level income inequality is a revealing indicator of group-based marginality. It not only reflects discrimination in the provision of educational resources, investment in human capital, and employment opportunities, but may also be indicative of discrimination in private markets and segregation in social networks.⁴ The degree of income inequality within a nation or state is not dependent upon the size of the economy or the wealth of a nation, but is rather a function of political institutions, cultural norms, and law.⁵ In other words, group-level income inequality does not depend on the size of the economic pie, but the distribution of that pie.

ANTI-DISCRIMINATION LAWS

The presence of anti-discrimination laws protecting marginalized groups is another direct indicator of institutional inclusion. Examples of such laws include laws that prohibit government and private discrimination on the basis of race, national origin, disability, religion, gender, or sexual orientation. Explicit protections for marginalized populations and social groups through anti-discrimination laws reflect not only of a society's commitment to equality norms for minority or marginalized groups, but also the presence of a discriminatory problem requiring a policy and legal response. Enacting anti-discrimination laws is not an easy task, especially where a marginalized group is an unpopular minority or lacks political clout or influence.⁷ Such laws often reflect broad consensus about the moral and practical necessity of enacting such protections.

RATES OF INCARCERATION

Marginality and inclusivity are often most dramatically evident in a nation's use of criminal law enforcement and incarceration differential rates. Criminal law reflects the cultural norms and values of the dominant group, and its enforcement through incarceration and other forms of criminal punishment are often inflected with social biases. Even in the absence of state oppression against minority or marginalized populations, incarceration rates may reflect cultural or social prejudices that disparately impact marginalized groups. Rates of incarceration more broadly reflect institutional and legal structures that impede inclusivity.

Rates of incarceration vary dramatically from state to state domestically and country to country globally. Lower rates of incarceration are sometimes reflective of more inclusive cultural norms generally, and an emphasis on rehabilitation and reentry over retribution and punishment. Differential rates of incarceration across subgroups serve as an indirect measure of cultural perceptions of those subgroups and their relative social position within a society. For especially marginalized social groups, criminal law is a tool of social control that may result in higher rates of incarceration and punishment.

IMMIGRATION/ASYLUM POLICIES

Another indicator of a society's degree of inclusiveness and group-based marginality within it is the society or nation's immigration or asylum policies. These policies decisions are reflective of the values and perspectives of the society vis-à-vis the marginalized group, and how welcoming or tolerant the dominant group is of outgroups. As an example of exclusionary immigration policies, the United States infamously had Chinese Exclusion Acts, quotas on many ethnic and racial groups, and a blanket prohibition on African immigration shortly after its founding. Strains of nativism and xenophobia tend to not only reflect the openness of a society with respect to the immigrant group, but also the degree of inclusivity within a society.

A complete list of indicators and a description of sources is provided in the Appendix at the end of this report.

Our Inclusiveness Index is a multi-factor index that is uniquely focused on the degree of inclusion and marginality rather than a more general assessment of well-being.

Multi-factor indices paint a more vivid portrait of underlying structural conditions and forms of advantage and disadvantage than single indicator approaches.

The goal of the Inclusiveness Index initiative is to identify policies, interventions, and other levers that have proven effective at ameliorating marginality and promoting inclusivity and equity.