

# The Trajectory of Social Inclusion and Activation of Older People Today

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**Abstract---** *The paper reveals region-specific trajectories of social inclusion and activation of older people. It shows the role of ideological perception of social reality that largely determines the choice of social inclusion trajectory. The paper documents findings from authors' studies carried out in 2014–2018 in three Russian regions. In Nizhni Novgorod Region, three studies were carried out: “Activation of older people in modern society” (N = 160 people), “Activation of older people in physical training and sports” (N = 100 people), “The potential of older people as perceived by the younger generation: the sociological aspect” (N = 307 people). In Ivanovo region, the socio-economic situation and social well-being of elderly people were monitored (N = 1160 people); raw data was used obtained from a sociological study of employment of Moscow retirees (N = 150 people). This research work, firstly, identified the dominant social inclusion trajectories of older people, which are “help yourself” and “help others”, and secondly, actualized the contextual and above-normative activation trajectory of older people.*

**Keywords---** *Older Person, Life Trajectory, Inclusion, Activation.*

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## I. INTRODUCTION

The elderly always remain in the focus of public attention, especially recently due to the reform of Russia's pension system. The social and economic status of retirees is currently evaluated as low due to their inappropriately low incomes; the extension of the retirement age is the most accessible, though contentious remedial measure. The process of reforming the pension system raised the question of the boundaries of the elderly age which is yet to be answered. One way or another, low resources of even the “modernized” retiree today, often put them at the bottom of the Russian social ladder. Vertical social mobility is extremely limited due to poor health, ageism, stigma, and discrimination, in particular, in the labor market. The above problems necessitate intensive research of social functioning of the older age group, namely the identification of adaptation methods through the choice of the best inclusion and activation trajectory for retirees.

Inclusion and activation trajectories of older people are closely related to the specific relationship between the government and society. What is meant here is the two directions of interaction between the government and society, one of which is the paternalistic model of the functioning of actors. On the one hand, it is the paternalistic orientation of interaction between the government and the older population is the most common today, which may be associated, above all, with the previous experience in the Soviet era, when the government practically excluded the subject-subject relationship at all levels in relation to all population categories, which led to the development of a welfare mentality among the third age population today.

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On the other hand, the other direction of interaction emerges between the government and retirees: the liberal ideology, which is becoming widespread among people of various ages, including the third age population. Obviously, the reason is the low levels of popular trust in government institutions due to (1) the crisis in the Russian economy that made people lose all their savings more than once, including the savings for old age, and (2) a low level of old-age insurance today. As a result, most of the retirees in the Russian Federation live in poor conditions, which is aggravated by low pensions, poor health, and age-related losses. The government is trying to solve the problem of low level of material security of retirees by “modernizing” the pension system. However, retirees may not live to the results of this “modernization”, because this process is going to take years, which, in turn, can even further motivate the older generation to be more active in various spheres of life. Of course, it cannot be claimed that the low trust to the government due to the low pension insurance income is the only driver of the "liberal" activation of older people. Among the older people, there are individuals who build interactions with actors as subject-subject relationship, who are willing to be needed to the surrounding people and apply the unique field-specific experience they accumulated in their lives.

## II. RESEARCH METHODS

Social functioning and socio-psychological well-being of the third age population is a well-covered topic. For example, problems of their social status are reviewed by P. A. Sorokin (Sorokin, 2002), N. M. Rimashevskaya (Rimashevskaya, 2014), M.S. Matskovskiy and A. G. Kharchev (Matskovskiy, Kharchev, 1978), I. V. Bestuzhev-Lada (Bestuzhev-Lada, 2006). Various aspects of social security of elderly people are looked into by M. V. Firsov (Firsov, Studyonova, 2016), I. G. Zainyshev (Zainyshev, 2002), T. E. Demidova (Demidova, 1995). Scholar papers by V. G. Dobrokhleb (Dobrokhleb, 2008), O. V. Krasnova and A. G. Lidere (Krasnova, Lidere, 2002), E. I. Chekanova (Chekanova, 2004), and the research group of N. V. Gudkov, G. V. Morozov, V. N. Pushina, and N. A. Ptitsina (Gudkov, Morozov, Pushina, Ptitsina, 2005) assess the resource potential of this age group. The matter of older people's activation in the historical perspective of the development of Russian society is presented in the works of Z. Kh. Saraliev (Saraliev, 1999), O. Stevenson (Stevenson, 1997), T. E. Sapozhnikova (Sapozhnikova, 2004), and others.

The multidimensional nature of social inclusion and activation in older ages necessitates the use of integral methods, including a set of qualitative and quantitative methods of data collection and a multi-stage research algorithm.

This article summarizes the findings from a series of the author's team's 2014–2018 studies focused on various aspects of the life of the older generation. To study the processes of social inclusion and activation of older people today, the authors carried out the following sociological studies:

- “Activation of older people in modern society” (N = 160, method — questionnaire survey);
- “Activation of older people in physical training and sports” (N = 100);
- “The potential of older people as perceived by the younger generation: the sociological aspect” (N = 307 people).

The study of the above issue employed the raw data obtained in the research project “Monitoring the socio-economic situation and social well-being of elderly people” carried out under the guidance of Professor V. N. Pushina at the Department of Social Work and Applied Sociology of Ivanovo State University (N = 1160 people). The raw data of the sociological study of the employment of Moscow retirees under the guidance of associate professor E. A. Kogan (N = 150) was used.

The object of the study is the process of social inclusion and activation of the elderly; the subject is social inclusion and activation trajectories of third age population today. The purpose of the study is to identify the dominant social inclusion and activation trajectories of retirees.

### III. RESULTS AND DISCUSSION

According to the authors, the chosen ideology of interaction of older people with society/government largely determines the social inclusion and activation trajectories of this age group. Social inclusion of older persons after retirement can take place both along the “help yourself” trajectory, that is, through their own effort, without hoping for outside help, or along the “help me survive” trajectory based on a passive and consumer's attitude, or on a negative resource potential (Ermilova, 2017, p. 95).

However, we should bear in mind that there is a category of the elderly who, while in most cases having a low income, can present an economic resource for their environment, thereby implementing the “help others” trajectory. The choice of the social inclusion trajectory directly depends on the ideological perception of social reality (see Fig. 1).

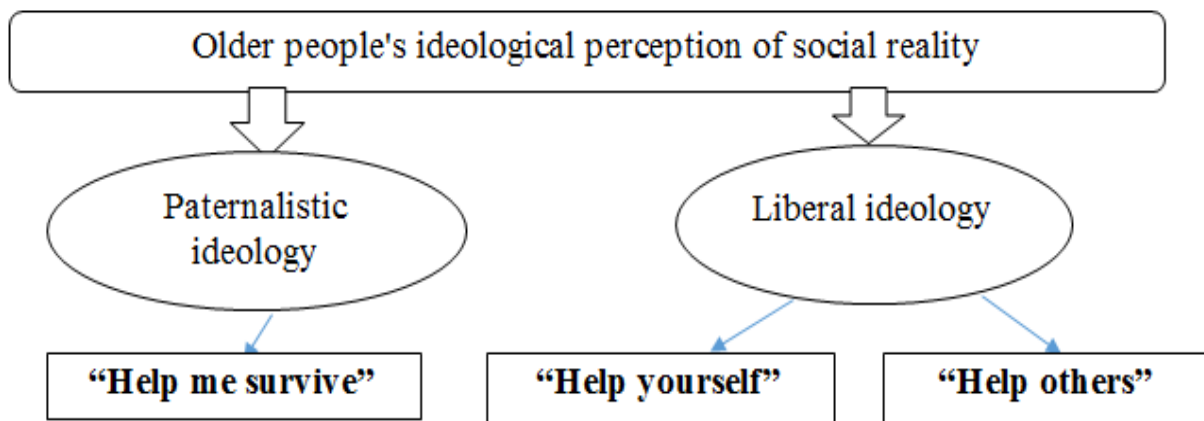


Figure 1: Social Inclusion Trajectories of Older Persons after Retirement

Authors' research shows that with every passing year, the liberal attitude gains ground among retirees who choose the “help yourself” and “help others” social inclusion trajectories. About 70% of the elderly participants admitted that they live by these trajectories, with the most common realization of helping their relatives, which refutes our assumption about the dominating consumer's attitude of the elderly population.

Of course, the consumer's attitude among older people who identify themselves with the “help me survive” trajectory is not uncommon, but it is, rather, associated with the physical impossibility of active life. They are

mostly people aged above 70 with complex medical conditions, often with disabilities. In other words, the choice of the social inclusion trajectory is dynamic and naturally depends on age: there are practically no people above 80 years of age to be going with the “help yourself” and “help others” social inclusion trajectories.

The core of the process of social inclusion of older persons is this age group's activation in various spheres of life through the development of social subjectivity that would enable to act not only in their own interests but in the interests of their environment, too. It is reasonable for an older person to remain a rational and active subject as long as possible. But the activation of older people can have a forced nature and be a prerequisite for survival in society. This type of activation was termed *contextual above-normative activation*. One of the means of such activation is labor activity.

According to the authors, social well-being of the elderly should be associated with normative activation, according to which pensions should be sufficient for the third age population not to have to work, but to realize their potential mainly in the fields of leisure, physical training, education and family (see Figure 2).

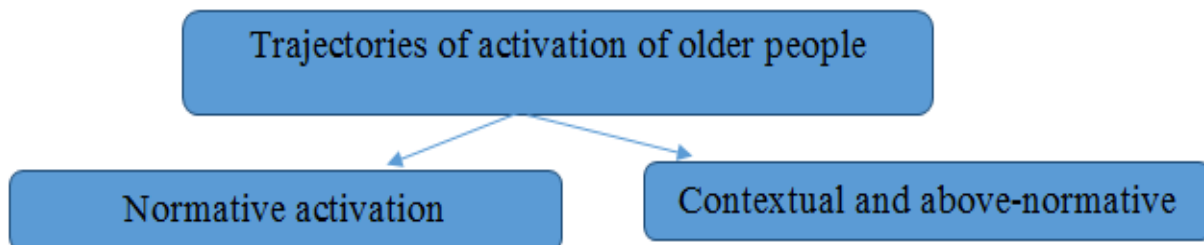


Figure 2: Activation Trajectories of Older People

Interesting were findings of a questionnaire survey of teenagers aged 12 to 19 (N = 307 people) that revealed the typical areas of activation of the elderly as perceived by the younger generation. Young people believe, a large percentage of retirees (52%) has potential resources, which they mainly realize in agriculture (the concept of a home-gardener) — (80.5%), career — 29%; cultural entertainment (going to museums, theaters, amateur talent activities) — 28.3%. Only 9% of respondents listed physical training as a means of social activation, although this type of activity allows to build social networks and maintain health.

It is worth emphasizing that none of the young people pointed out the possibility of self-realization after retirement in family and household, which can be attributed to the elimination of the postfigurative and cofigurative types of cultural exchange between generations. Resulting from the transformation of Russian society, which among other things affects intra-family interaction through the impact on the family structure and functions, we would like to pay special attention to bifurcation processes within the institutions of family and marriage, because they reflect the life of retirees today.

Currently, a steady trend of nuclearization of the family is in evidence, with fewer older persons sharing a household with their children and grandchildren. This forces the elderly to resort to contextual and above-normative activation, without counting on relatives' help. It is also worth pointing out the trend of changing social attitudes of third age population, which is mostly due to the increase of their social subjectivity. A large part of the “young

elderly” i.e. those under 70, is characterized by an active social stand, according to which, out of fear of loneliness, potential depression after retirement, they become more active in various fields, such as education or civic activity.

Research interest, however, is focused rather on the activation of retirees through employment. This largely reflects the interests of retirees themselves. According to an authors' study (N = 160), 47% of men and 49% of women of the retirement age, would like to continue to fulfill themselves in their career. A greater percentage of elderly women (42% vs. 12%), naturally, associate their activity with family and household relationships (Ermilova, 2017, p. 97).

The fulfillment of the older persons' labor potential is currently under close governmental attention. The legislative and executive authorities are expanding employment opportunities for retirees at the federal and regional levels, for example by retraining people of the retirement age, taking into account the needs of the production team and the elderly employee's competence level. Successful practice of corporate training of elderly employees is demonstrated by such large enterprises of the Moscow region as OAO Kriogenmash, OAO Voskresenskie mineral'nye udobreniya, OAO Pribornyi zavod Tenzor, N. E. Zhukovskii TsAGI, OAO Yolochka, OOO Ton, OAO Kolomenskii zavod, OAO Metrovagonmash, OAO Zio-Podol'sk, OAO Ramenskii priborostroitel'nyi zavod (Ministry of Labor and Social Security of the Russian Federation: results of monitoring the social and economic status of elderly citizens). Nevertheless, it should be borne in mind that the employment activation of older people is related to the contextual and above-normative activation trajectory, and third-age people do not always resort to because of the wish to be needed by the society (see Figure 3).

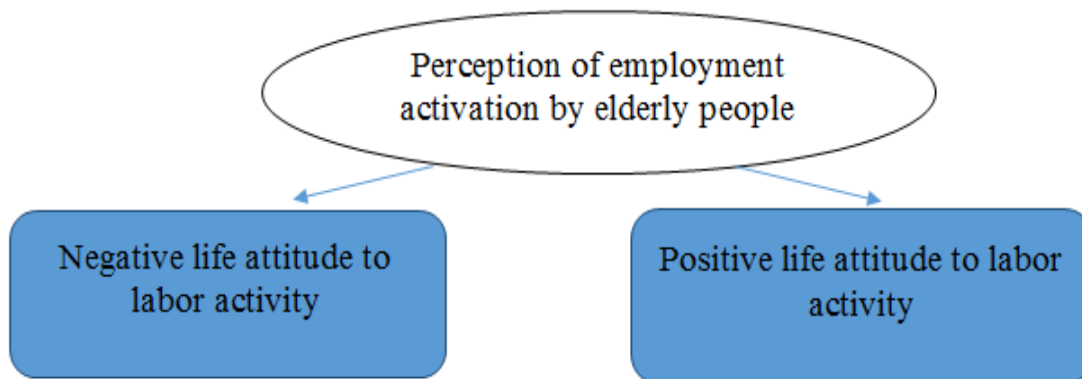


Figure 3: The Perception of Labor Activation

Sociological data (monitoring of the socio-economic situation and social well-being of elderly people (N = 1160), a study of employment problems of elderly people at the Moscow Aviation Institute (N = 150), a study (N = 160) of regional specific features of labor activation of retirees) show the dominance of negative attitude of Russian retirees toward their own employment. Having to work due to the extremely low pension and the stigma attached to the low-paying jobs, where the level of the retiree's qualification is ignored, leads to the negative perception of their employment by 86% of working retirees. As E. A. Kogan points out, the retired population has the highest chances of getting jobs such as an elevator attendant, cleaner, or doorkeeper (Kogan, 2014, p. 806).

The analysis of sociological data revealed the following trends of the attitude of elderly persons to labor activity:

- High level of education and qualification of retirees is a factor of a positive attitude to working after retirement;
- The formation of a positive image of employment in old age is related to the opportunity to work in their specialty and in their team;
- For a major part of retirees with a positive attitude toward their employment, labor activity is the support that allows them to live fulfilling lives and feel their significance in the society (usually, these are elderly single women above 65);
- The negative attitude of employment is promoted by the downward vertical mobility in the labor sphere, namely the transition of retirees to low-skill and low-paying jobs as compared to their occupation before retirement.

A trend should be pointed out about an increase in the level of negative attitude toward the labor sphere proportionally to the increase in the employment length after retirement, which suggests that there is a need for timely termination of labor activity. It is noteworthy that the negative attitude of the labor sphere increases dramatically after the age of 65 years, which is mainly associated with the deteriorating health of this age group. However, the reform of the pension system ignores this and may lead to further deterioration of health of the third age population.

Labor motivation of retirees was analyzed by comparing findings from studies carried out in different Russia's regions, in particular, in Moscow and in the provinces (Ivanovo). The leading motives for continuing labor activity regardless of the residence are: the need for providing for oneself (the “help yourself” trajectory) and supporting children, grandchildren (the “help others” trajectory), which may indicate the financial instability of retirees and their family. Elderly Muscovites is a more ambitious category of retirees because, among them, there are more employed persons who need to feel their social significance (Ermilova, 2016, p. 437).

It should be emphasized that the majority of Moscow retirees have a positive attitude toward their employment after retirement because the majority of the elderly remain sought-after in the fields they have been employed most of their lives. They are mostly people employed in education, science, public health, culture, and social security. Moscow retirees display a greater willingness to upskill and reskill, which can indicate their conscious inclusion in the economic reality and about their understanding of the need for further personal growth.

However, it should be borne in mind that the two regions are abysmally different in terms of opportunities for the third-age population to fulfill their potential in various social spheres. A pronounced negative attitude toward employment after retirement is typical for elderly living in the provinces because due to the lack of jobs, retirees there have to take positions that do not fit their professional status.

The root cause of the negative attitude of retirees toward employment, in our opinion, can be revealed through the concept of idealization of the everyday life proposed by A. Schütz (Heinz, 2000, p. 91–92). Most third-age persons carry out their labor activity in the world of two constructive expectations. The first is “And-so-on”, when they are confident they can use the accumulated knowledge and skills in their labor relationship (i.e. the previous

experience is still valuable) and, thus, expect recognition in the working team. The other is “I-can-do-it-again”, based on the orientation to reproduce successful behavioral patterns in typical situations. However, action methods of the past currently used by an older employee can be irrelevant in the changed system of labor relations. At the same time, due to age-related changes and deteriorating health, the second type of constructive expectations is becoming irrelevant in today's system of labor relations. Therefore, the process of habitualization of the labor activity of the elderly people can propel their displacement from the labor sphere by the younger generation.

Nevertheless, it has to be recognized that older people today are productive social actors that have the contextual and above-normative activation type. A large proportion of young people aged 12–18 (58%) agree with this view (N = 307 people), mostly identifying female persons with employment under 70 years of age. Young people admit that their grandparents are not a financial burden for them and their parents, and they often seek help from third-age people. This, again, emphasizes the existence of two social inclusion trajectories for the older population today: “help yourself” and “help others”.

#### IV. CONCLUSION

The society today should pay proper attention to the accessibility of activities for older people that support and improve their health. Those activities include physical training and sports. The importance of physical training in the lives of retirees should be increasing now because the predominant type of activation today should be the normative activation of this age group rather than the increasing role of employment.

The significance of sports and physical training is definitely high within fitness and health centers that present the opportunities for elderly people to not only improve and repair their health but learn new social and cultural activities. Sport-related activities support the statuses and roles of the elderly person and their active live by supplementing or compensating employment with various sports and fitness activities; restore the lost and develop of new communication skills (Ermilova, Sudarikov, 2018, p. 328).

The social inclusion of most older people is carried out through two trajectories: “help yourself” and “help others” using a contextual and above-normative activation trajectory, to a greater extent related to the negative direction of activation in their career. The authors believe, the found trend has negative consequences both for the physical and social well-being of the elderly person. For example, the contextual above-normative trajectory of activation can adversely affect the health of persons of the third age, and their increasingly active life might adversely affect the intrafamily relations, break ties between generations, lead to the overaccumulation of socializing potential and, as a consequence, loneliness.

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