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Social Exclusion by Age: The Ukraine in Comparative European Perspective

TATIANA HRYSHYNA (UKRAINE)

Kyiv Taras Shevchenko National University (Ukraine)

Paper for the 2012-edition of the international (post)graduate course on Inclusion and Exclusion in Contemporary European Societies: 'Challenges of Europe, the Strength of Soft Power'.

April 16-20, 2012 | Dubrovnik (Croatia)

www.inclusionexclusion.eu

Introduction

Life expectancy increased by 20 years over the past half century as mentioned by UN. It is together with falling birth rate lead to a permanent increase of elderly population. Ukraine is fully characterized by this global trend, because the population older than working age is growing, despite the total population reduction. According to statistical data Ukraine is country with aging population (15,6% of persons over 65 years old) ('Social Security Programs Throughout the World: Europe', 2010). It invites our attention to different social problem connected with elderly and the social exclusion is one of them.

Social exclusion and social inclusion are the popular and good investigated research theme in European scientific discourse (for example, Laeken indicators, English Longitudinal Study of Ageing and so on), but this topic is not common in Ukraine. So, this paper tries to measure social exclusion of elderly in Ukraine and explain the difference in comparison with other European countries.

Theoretical and Methodological Background

In this paper elderly is defined as set of people of one age range, who are aware of their belonging to this age group and are considered as members of it by others. Empirically elderly is aged 60 and older. "Age label" for elderly of 60 years was chosen, because it is official retirement age for women in Ukraine. Also it is the age people start being described as old in Ukraine is generally between 60 and 65 years (33% of respondents¹).

Elderly is a social group with a high risk of social exclusion, exclusion not just from the labor market and material recourses, but also from social relationships. So, there are two most common general approaches to social exclusion: distributive and relational. The first sees the absence of material resources as the key aspect of social exclusion, which caused by poverty and lack of a permanent paid work. Relational approach determines the social exclusion by the social disconnection and lack of social relationships. Thus, not only lack of material resources, but also low levels of participation in political, social, and cultural life of society leading to social exclusion. It should be noted that the second approach does not exclude the gains first. In modern studies of social exclusion prevalent synthetic approach that combines both an understanding of objective reasons (lack of material and social resources) and subjective feelings of loneliness and isolation. For example, C. Phillipson and T. Scharf identify his approach in the following way: 'lack of material resources is viewed as an important cause of nonparticipation, but the role of non-material factors will also be highlighted' (Phillipson, Scharf, 2004:10).

¹ According to European Social Survey data (fourth wave, date base ESS-2008/9)

Nowadays it is the most popular, but not broad approach. It focuses only on the level of social networks (relational discourse) and level of whole society as the material providers through social institutions (distributive discourse). In this wise individual level (feeling to be included) is neglected. One of scholars, who highlight such problem, was R. Levitas. She allocates three different approaches to social exclusion studying: redistributive discourse, social integration discourse and moral underclass discourse. Redistributive discourse (RED) considers social exclusion as caused by poverty. But exclusion is more complicated than poverty. It is more dynamic and various process, which connects to limitation of access to the main social resources. Social integration discourse (SID) treats social exclusion as result of breach of social integration. The main factor of social inclusion is economic activity due to the presence of permanent employment. So, unemployment is perceived as risk factor of social exclusion. Besides, social exclusion is caused by moral and cultural differences according to moral underclass discourse (MUD) (Levitas, 2003). So, the social activity and common values are also important factors of social exclusion overcoming. But, in this paper we focus mainly on such form of social exclusion as exclusion from material resources, exclusion from social relations, health and neighborhood exclusion according to available data for analyze.

All recent approaches highlight the multidimensionality of exclusion. For example, the Laeken indicators present a set of primary and secondary social indicators of the EU process on social inclusion/exclusion. It covers four main dimensions of social exclusion: financial poverty (risk-of-poverty, inequality of income distribution), employment (unemployment rate, living in jobless households), health (life expectancy, self-defined health status) and education (low educational attainment) (Atkinson, Marlier, Nolan, 2004:52-58). The English Longitudinal Study of Ageing (ELSA) focuses on the full range of economic, social, psychological and health elements of the ageing process to study the social exclusion of older people. It includes widely list of dimensions of social exclusion: social relationships, cultural activities, civic activities, access to basic services, neighborhood exclusion, financial products and material goods (A. Walker, M. Barnes, K. Cox, C. Lessof, 2006:6-7).

By the same token social exclusion of elderly is often studied in the context of relationships and resources that exist outside of paid employment. Unemployment may be not only forced due to age but also it may be the result of deliberate choosing. So, unemployment is more the risk factor of exclusion for elderly than the one of dimension. Thus, T. Scharf and A. E. Smith focus on the links elderly within and beyond the community. Theirs approach includes five distinct dimensions of social exclusion of elderly: exclusion from material resources; exclusion from social relations, exclusion from civic activities, exclusion from basic services, neighborhood exclusion (Scharf, Smith, 2003:162-179).

Therefore, in general social exclusion of elderly is defined here as multidimensional process, which limits access of elderly to the main resources and also restricts participation in different areas of society. Social exclusion manifests itself in many areas. We can talk about income, neighborhood exclusion, and others. But when this process covers several areas, we are dealing with 'multiple exclusion'.

Experience of social exclusion of elderly

G. Jehoel-Gijsbers, C. Vrooman give as an example of comparative study of social exclusion of the elderly in EU member states. Results of this research stress the difference between European countries. Thus, elderly persons are less excluded in countries with higher level of national wealth, because they can spend more resources on social protection, overcoming income inequality and increase life expectancy. There are some hierarchy of European countries by the degree of social exclusion of elderly: Nordic countries and the Netherlands (the least excluded) – Continental and Anglo-Saxon countries – Mediterranean countries – Eastern Europe (the most excluded, especially in the Baltic States and Poland) (G. Jehoel-Gijsbers, C. Vrooman, 2008:8-11). So, we can aspect that the degree of social exclusion of elderly is essential in Ukraine.

Measuring social exclusion is grounded on the secondary analyzes of European Social Survey data (fourth wave, date base ESS-2008/9). ESS core module includes main indicator for empirical investigation of social exclusion. Such indicators as economic resources, health, social networks and victimization are used in this paper. So, it focuses both on distributional and relational aspects of social exclusion of elderly.

One of the key dimensions of social exclusion is the lack of economic recourses and material disadvantages, particularly the range of household's income. I chose the subjective level of household's income nowadays for analysis. For better representation it combines in two wider dimensions "enough income" (living comfortably on present income or coping on present income) and "not enough income" (finding it difficult on present income or finding it very difficult on present income). According to this data the situation with elderly in Ukraine is extremely tense. There are 83.3% of respondents older 60 years describe theirs subjective income as not enough. It is the lowest rate in Europe (counties included in ESS).

According to U.Katz and M.Elutina research older people are socially excluded because the main source of their income is state pension, social insurance, grants, donations, etc. Also, the retirement age is associated with the end of a career. Low-skilled, low paid work is mostly available for people of retirement ages. Employment is seen usually as a mechanism of increasing the current income because of a small pension by Ukrainian elderly and is not seen as

continuation of professional development. Also, older people are often deprived of prestigious consumption, education, and often feel lack the money for leisure and quality rest (Elutina, Katz, 2007).

Vary reasonable explanations of this situation give us by Russian scholars A. Smolkin, who represents elderly as migrants in time. It was qualitative research in Russia, but their results good correspond to modern Ukraine. The main reason of older people's poverty usually is just age. The finding of "the poor, because the old" does not require any arguments between our citizens. Aging is seen automatically as a presumption of poverty. Yet such generalization leads to the consolidation of negative stereotypes towards elderly as helpless and worthless. All this leads to a reduction of social status of elderly. Usually not prestigious employment such as concierge, cleaner, conductor and other are available for elderly in Ukraine and in other post-soviet countries. They receive usually job position ignored by youth due to low salary and absence of an opportunity to aggrandizement. It is with a high probability reinforce negative perceptions of elderly. Also the material position of elderly has some unique specification in Ukraine and other post-soviet countries. All claims of elderly according to poverty are addressed to government, but no to elderly at all. It is not only paternalistic expectation. It also results of social contract breaching between elderly and government (Smolkin, 2010:181-185). So, there had been no legal ways for Ukrainian elderly to look after themselves except the government pension. A lot of social program were closed after the Social Union collapse. So, elderly has both material and status losing.

Health also is a one dimension of social exclusion, which one of the main reasons for decline of social status of elderly. Thus, they are often are considerate as a homogeneous social group, which is characterized by poor health. Besides the health is often decline with age, it rather caused socially then biologically. So, A.Tolstyh maintains the "disease of old age" as the result of the set partly real and partly imaginary obstacles to normal vital functions. Elderly start felling "death coming" and "loss of life instinct" (Tolstyh, 1988:211-213). This condition is the tragic time of old age. So, it is important to maintain positive assessments of health status in old age.

But, in Ukraine the stereotyped perception of older people as unhealthy is partially justified, since only 5.6% of elderly rate their health as good ("good" or "very good" in questionnaire). There are a wider range of reasons of such situation. But, besides objective reasons it is interesting to focus on subjective one, because biological aspects of aging can be limited by "successful" aging practices provided by adequate social climate. For example, A. Levinson emphasizes that the turbulent changes of transformation processes broke the system of correspondence between status and age. Often young persons had incomes higher than their

parents. So early socialization is no longer characteristic of our societies, but a new socio-economic environment tends to an unusually early desocialization (Levyson, 2005). This process probably accompanies with decline of health perception and social contact reduction.

Reduction social contacts are also influential dimension of social exclusion. Results of secondary data analysis showed the presence of limiting the social contact of elderly in Ukraine. Thus, the number of people, who rarely meet with friends, relatives or colleagues (less than once per month), is 37.2% of people over 60 years in Ukraine. Besides, it is 52.9% of elderly, who are living without spouses, so it also may be a problem with communication within family. Famous Ukrainian sociologist N. Panina argues that there are a series of events changes the social position of elderly. Especially important is retirement, which significantly changes the social status of elderly. It causes changing the usual rhythm of life, reducing the credibility, contacts, some material loss, etc. But, it also has some achievements, such as gaining of free time. However, the circle of communication has being reduced and passive leisure has being increased since retirement. One of the main reasons for this passive way of life is the lack of specific plans for the future. Elderly usually do not know what they will do in retirement, most seek to "live quietly" and "die peacefully". They plan to rest, but do not know how this will happen, so common use watching television and reading books as entertainment options (N. Panina, 2008:262-267).

One of the reasons of such behavior is the social stereotypes and role anticipation toward elderly.

Thus, the perception of social groups of elderly is often due to negative age-related stereotypes. The most widespread stereotypes toward elderly according to other research are:

- the retirement age should be raised (it is stereotype of groups with high social status);
- elderly employee are ineffective;
- elderly workers take place of young people in the labor market;
- elderly is too old for learning (“the old person teaching that the dead be treated”);
- retirees are always poor;
- older women are ugly;
- the expenditure of older people should be minimal;
- the older generation is a “burden” for society in a market economy (Dobrohleb, 2006).

They are still actually for Ukrainian society. These stereotypes lead to discrimination of elderly in various areas of society. For example, declarations of a vacancy often define the age of desired employee no more than 50 years old in Ukraine.

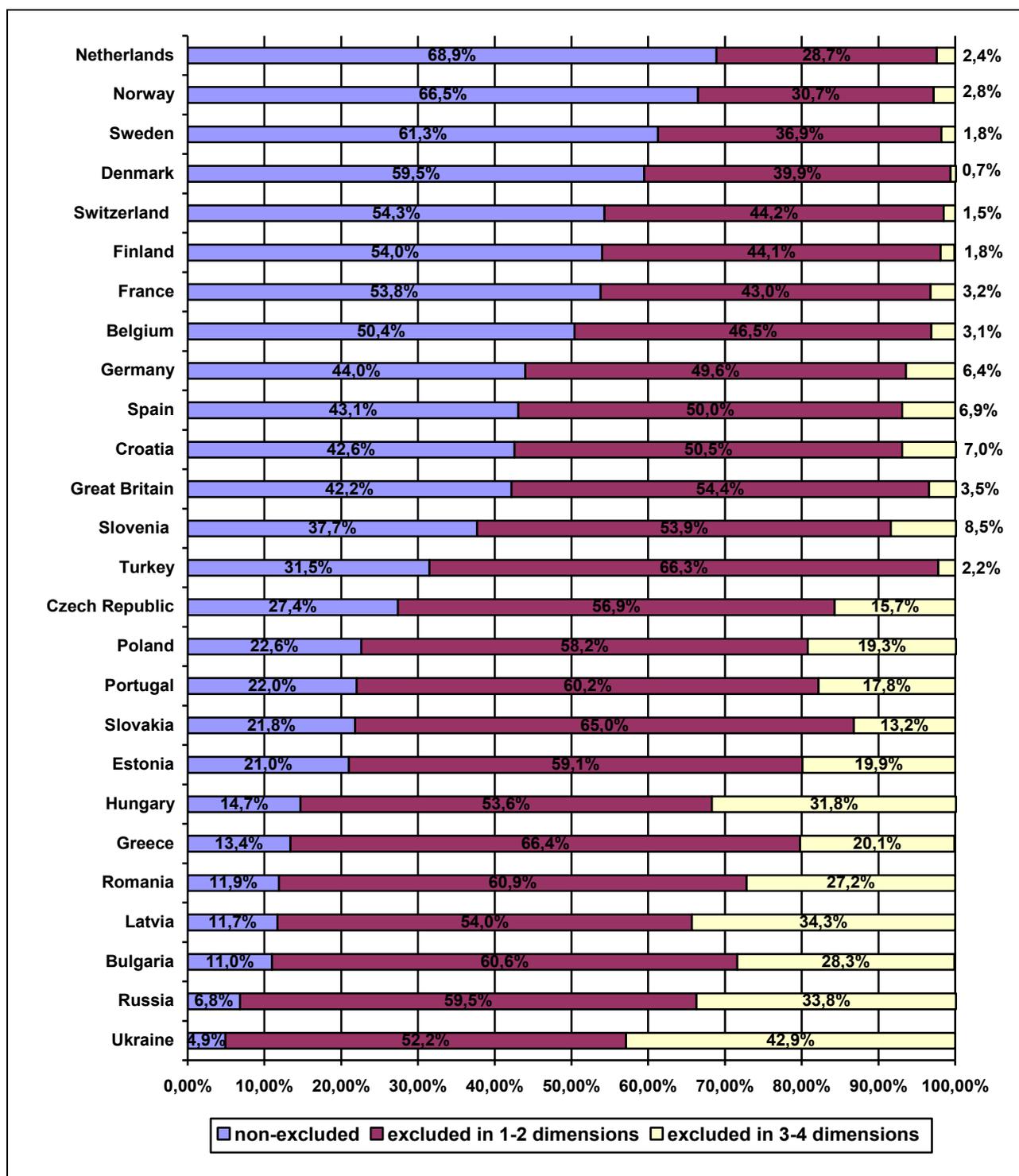
The last dimension of social exclusion which I focused on is the neighborhood exclusion. It strongly connects with the level of victimization. For example, T. Scharf and A. E. Smith

research neighborhood exclusion by indirect measure of the neighborhood's impact on respondents' self-identities. They measure the individuals' expression of views about neighborhood and safe feeling when out alone after dark. The reason of using such indicators is following. Elderly living in unsafe and unpleasant areas with high probability will be restricted in their ability to participate in a variety of social roles (Scharf, Smith, 2003:165-166). In other paper written in co-authorship with these scholars, geographical distribution is studied as social exclusion dimension. There three different areas of discussion of older people exclusion are represented: participation and integration (access and link inside and outside the local community), spatial segregation, institutional disengagement (difficulties in access to basic services). So, spatial segregation includes three different forms of spatial segregation: *segregation of mental space* – fears and ideas about specific locations, for example, the concerns about crime; *segregated narratives of space* – common understanding and history of a particular place, for example, the extent of older people's expressing a common understanding of their surroundings; *segregated economic space* – how different groups occupy economic space, for example, using of different shops in local neighborhood (Scharf, Phillipson, Kingston, Smith, :304-310). In Ukraine we has intense situation with neighborhood exclusion of elderly. Data show us, that 66.2% of elderly feel unsafe when out alone after dark at the place of living. It is the higher rate in Europe. This dimension of social exclusion of elderly is also important, because older people usually spend more time in their immediate neighborhood rather than other age groups.

Consideration and analyze of different dimension of social exclusion of elderly is weightily, but it is also important to study theirs combinations in comparative European perspective. Because, it will be evident to see how many this dimensions are characteristic for elderly at the same time.

So, all these foregoing 4 indicators of social exclusion were combined in one index – multidimensional exclusion, which includes such alternatives as non-excluded, excluded in 1-2 dimensions, excluded in 3-4 dimensions. The retirees are compared in this case due to different age of state pension and accordingly the different age of perception people as senior citizen and elderly. The inter-country comparison shows that retirees in Ukraine are the most excluded. It is only 4.9% of non-excluded. By the way, there are 61% in Sweden, 66,5% in Norway, 69 in Holland (see the Table 1). It is the highest rate in Europe. The least rate in Europe after the Ukraine is Bulgaria – 11%, but it almost twice than Ukraine. The specificity of the excluded situation of the elderly in Ukraine becomes noticeable when comparing older age group's access to material resources with youth. There are only 7% of excluded in 3-4 dimensions in comparison with 43% of retirees in Ukraine. The different is evident.

Table 1. Multidimensional exclusion of retirees.



Conclusions and challenges

In this paper we try to represent main age-related characteristics related to social exclusion. Elderly in the Ukraine is at a disadvantage in comparison with European countries. They are significantly worse estimate their income and health, less maintain social contacts with friends, relatives or colleagues. Possible reasons of such differences may include the different social policy, the consequences transformational process, the different levels of country's wealth, the

difference in retirement age, the cultural differences in perception, and the passage of socialization in the Soviet Union. This poses challenges for social policies to reduce the proportion of excluded elderly.

By the way, the problem with elderly exclusion not only in material deprivation, but also connected with habit of saving, unwilling to have diversity leisure and so on. In contemporary Ukraine government give the state pensions for elderly, free using of public transport, discount for payment for municipal services and some others facilities. The opportunity for leisure, education and conversation are less presented. Some centers for elderly, The University of Third age are presented in Ukraine, but there not widespread and not popular among elderly. So, first of all Ukraine needs to explore the European experience in social policy. A. Hoff presents a wider range of different “examples of good practice” from the European countries. Some of them are especially helpful for Ukraine. For example, the schemes the “Adopt a grandmother!”, which is adopted in Austria, Poland and Spain. This program allows older people without family ties to be included in functioning family households. Such informal strategies lead to communication between older and the younger generations and herewith to the inclusion of elderly. Also, the excellent examples of such strategies are local community centers, which centers inform older people of their rights and entitlements, provide some elements of health and social care, and give an opportunity for socializing, in some cases also specifically for meeting younger generations. They are presented in the Scandinavian countries (called ‘service houses’) and in Germany (called ‘neighbourhood centers’). In this case also the good working relationship between the voluntary sector and the government is very important. It could take various forms, ranging from consultations with central government departments about policies for the elderly to close collaboration in service provision at local level. Good example of such practice is ‘Older Person’s Parliaments’, which is presented in Cyprus and Ireland (Hoff, 2008). Lack of such programs and initiatives particularly felt in the contemporary Ukraine.

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