THE SOCIAL EXCLUSION AS A PROBLEM OF SELF-REALIZATION OF THE ELDERLY

OLESYA KOROPETSKA

Abstract. The article presents the problem of social exclusion, which in the context of such challenges of global society as poverty, inequality, migration, aging of population, has become one of the most urgent in different countries and continents. It is actual both, for the residents of the USA and for the citizens of Ukraine. While living in different countries, we are the residents of our common “house” - Earth and many problems of modern global world make us more close to each other than we even can think. Among them - a problem of social exclusion and aging of population, which destroys the democratic and human rights both of the inhabitants of Appalachians and the hutsuls, living in Carpathian Mountains in Ukraine. The social, cultural and behavioral aspects of the problem of exclusion and aging of population are analyzed in the article. Peculiarities of aging, cognitive and emotional state of personalities in the period of aging, the personality’s attitude towards aging and social exclusion reflect the feelings and experience of people and show that they are similar as for residents of Appalachian region and for gutsuls of Carpathian mountains. In the article it is stressed that social exclusion is dangerous for people of all ages, especially for people from families, for residents of mountain regions, for orphans and disabled. Not having sufficient capacity to manage the situation, they all feel powerless and unable to manage their life. That is why most countries of the world pay great attention to overcome social exclusion. And since the second half of the 90-th the fight with social exclusion is an integral part not only of the EU’s and of the USA’s social policy, but it also has become an important direction of the social work in Ukraine.

Keywords: social exclusion, aging, self-realization.

Initially the concept of “social exclusion” emerged in the late of the twentieth century during the study of such social phenomena as poverty, marginalization, deprivation and others. It was introduced by a French governor Rene Lenoir to describe the limitation or deprivation of rights in civil law, such as restricting access to institutions of social integration, especially to the labor market and to the social services, access to education and the right to work.

This term is - the postmodern equivalent of poverty - a condition where the minority find themselves marginalized from society. In the result of it, the new form of social stratification has appeared, namely, the previous vertical class stratification gradually was changed into the new one, horizontal or social, which has divided people into two groups: “insiders” and "outsiders" that reflected the marginalization of population, related with limited access to societal institutions.

So, the static concept of "poverty" was replaced by a new dynamic category of "social exclusion".

Nowadays the term of “social exclusion” is used, when talking about the limitations, connected with people, deprived in their social rights in different reasons: destruction of social ties, curtailment of social space, reduced social capital, the problem of trust in the relationship with society, loss of activity, the problem of self-realization.

So the concept of social exclusion is seen as notion, covering a remarkably wide range of economic and social problems. Among them the problems which are connected not only with the material but also nonmaterial dimensions. First of all it concerns of mentally and physically handicapped, suicidal people, aged invalids, abused children, substance abusers, delinquents, single parents, multi-problem households, marginal asocial persons and other social “misfits”.

According to G. Rum, the coordinator of one of the European’s programs of fighting with social exclusion, "individuals suffer from social exclusion, when: 1) are at a disadvantage in terms of education, training, employment, housing, financial resources etc. and 2) their chances of getting access to basic social institutions, distributing these life chances are significantly lower than in the general population, and 3) similar restrictions last for a long time."

Peter Townsend, a British sociologist and the author of the concept of relative poverty, who studied the conditions of life of the poorest and most handicapped members of the society stressed, that individuals, families and groups in the population can refer to be in poverty when they lack the resources to obtain the type of diet, participate in the activities and have the living conditions and the amenities which are customary, or at least widely encouraged or approved in the societies to which they belong. Their resources are so seriously below those commanded by the average family that they are in effect excluded from the ordinary living patterns, customs, and activities.

Hilary Silver noted, that the man who identifies himself to mainstream must have means of livelihood, permanent work, income, property, land housing, certain consumption, education, cultural capital, citizenship in and respect for.

A. Giddens noted that exclusion is not a gradation of inequality, but it is a mechanism that is moving groups of people away from the main social stream. Giddens points to two main forms of social exclusion, manifested in today’s society. The first form is located on the top of the social hierarchy, and is connected with the voluntary self-exclusion of elite. The second - extreme form of the "victims of structuration", - centered at the bottom of the hierarchy, which is the result of structural and cultural changes in society and in the opinion of Giddens, threatens the social space and solidarity.

Regarding to this, it should be said, that an active discussion among scientists on this topic is still continuing, in particular, whether to treat a group of "marginalized and excluded" people as real subjects of integration in public "mainstream" or consider them as just subjects of a specific policy, management and control of the authorities as deprived on their own territories.

Social exclusion (exclusion) can be characterized as bilateral process, which is connected with:

1. The state’s attitude towards disadvantaged groups, who have experienced a sharp decline in the level of material security and social status;
2. Group’s behavior, aimed at identification with the poor, the recognition of the economic dependence and consolidation on survival strategy.

Deep processes that give rise to social exclusion are connected with individual’s socialization, especially, at early stages. It is assumed that an unsuccessful socialization is one of the most important causes of social exclusion.

In fact, the process of socialization is deeply individual and flows throughout a person’s life in the relationship of complex factors, determined by objective and subjective conditions, depending on internal sources and external environment.
The socialization process consists of two components: the first - a content (meaningful) component and the second - functional component. The content (meaningful) component of the process of socialization includes:

- the formation of professional skills, knowledge and skills;
- formation of a system of regulation - substantially human behavior;
- formation of a system of values and its regulatory, legal, ethical, social, political, beliefs and perceptions, values and attitudes etc;
- the formation of self-regulation, the ability to self-evaluation, self-criticism;
- the formation of emotional and volitional personality traits.

The functional aspect of socialization includes the internal and external regulators of human behavior. External control system - is the general social determinants and social institutions, which are the carriers of the external system of social norms - political, legal, ethical, social, collective, value-regulatory submissions, which acting as regulators of human behavior.

External regulation, in turn, in the course of socialization gradually transforms into a system of internal control of human behavior. The structure of socialization can identify a number of social and psychological mechanisms: adaptation, cognition, imitation, cooperation, suggestion, facilitation, inhibition, empathy, of expectations, identification. The effect of these mechanisms is determined by many factors, such as society and the processes taking place in it, as well as various groups and social institutions (family, labor groups, the social environment, the media).

Just these phenomena, which actualize the formation of personality in a dynamic social life, fixing out not only a passive acceptance of the environment, but reflecting the personality’s activity in application of the transformative experience, her mobilization in choosing of her own strategy for self-building, self-organization and self-realization within the structure of the model of society.

The given analysis of social exclusion allows concluding that most of the researchers took into account at least two important moments: first - lack of resources, and second – absence of “normal”, i.e. of acceptable way of life. It means that the exclusion should interpret as negative deviation from social norm, which can be determined by different factors, as individual, so social.

Referring to the notion of social “norm”, we apply to the position of I. Gouf, who proposed the differentiation of people’s needs, which he devided into universal, basic, intermediate and societal. Basic needs - physical health and autonomy, and at the same time they can be interpreted as universal conditions for successful social participation. Health in this context can be interpreted in two ways: as the absence of specific diseases or deeper - as survival. Autonomy - the ability to initiate action, formulating of goals and beliefs, which are vital attributes of human existence. Intermediate needs include the following: adequate nutrition, adequate housing, conditions of work, that are not harmful to health, the environment without causing harm, adequate medical care, safe childhood, meaningful relationship in the primary medium, physical security, economic security, the protection of motherhood and childhood, basic education. All these intermediate needs are called to maintain the health and autonomy of man and thus enable him to take an active part in social life. Satisfaction of intermediate needs should be guaranteed by the state through the social infrastructure, health care, labor rights, education and income support system, while the other socio-cultural needs can be met by the local community, but with obligatory state support.

At the same time, social exclusion, can and should be controlled by means of social integration. So, the main task of state is to provide the inclusion of those, who appeared outside of society, to help them to be back to the active life, to save them and help to realize their potential ability.

The study of the phenomenon of «self-realization» refers to the first half of the XX century. In 1935, the terms "self-realization" and "self-actualization" were introduced into scientific using by neuro- psycho-physiologist K. Goldstein. In his work «The Organism» K. Goldstein described self-realization as a universal principle of life. Later the problem of self-realization was developed by A. Adler, G. Allport, Sh. Buhler, J. Kelly, K. Horney, A. Maslow, R. May, G. Murray, G. Murphy, C. Rogers, C.G. Jung and others. In the context of age, the problem of “self-realization” was studied by A. Maslow,
E. Erikson, K.A. Abulkhanova-Slavskaya, L.V. Prokhorova etc. Peculiarities of self-realization of seniors were investigated by N.M. Amosov, L.I. Antsyferova, R. Simonov, V.P. Kaznacheev etc.

In the most general sense, the notion of «self-realization» indicates the implementation of opportunities of development of «I». Quite often this term is used as a synonym for the words «self-development», «self-actualization», «self-fulfilment». All these words are very close in their meaning. They all were described by humanists as phenomenon, which indicate at: the realization by a personality’s natural potential (K. Horney), a human desire for a total identification and development of one’s opportunities and abilities (K. Rogers), a development of human potential as an opportunity to become what one can become, to live fully and to be full of sense of life (A. Maslow), achievement by a personality of integrity and unity by means individuation (C.G. Jung), a personality’s innate desire to self-realization (Sh. Buhler).

In general the desire to realization of one’s own “I”, practically, by almost all authors was explained as the disclosure of latent potentialities of the individual. At the same time, no one of humanists didn’t try to explain definitively such important basic methodological notions in self-realization’s theory, as the nature of self-realization, motive forces and conditions of self-realization, determinants and significance of self-realization, which even today remain debatable, since modern scientists could not come to a common thought what self-realization is: a process, the result, an innate tendency, ultimate goal or something else.

Up to the 90-th the Ukrainian and Russian psychologists considered the problem of self-realization in the context of psychology of self-determination, in particular, it was not interpreted as an independent branch of psychological science, but as a structural component of psychology of “self-determination”, the contents of which most fully was investigated through the concept of “personality”, which studied in the plane of such notions as “self-cognition”, “self-expression”, “self-regulation” (K.A. Abulkhanova-Slavskaya, B.G. Ananev, L. Bozhovich, M.R. Ginsburg, G.S. Kostiuk, M.J. Boryshevskiy, S.D. Maksymenko etc).

From the 90-th of the XXth century there appeared a tendency to view self-realization as a separate subject of study. In current psychology the notion of “self-realization” is interpreted as a form, and as the result of the individual’s activity (D.A. Leontiev), as realization of opportunities of “I” by means of efforts of personality and in collaboration of personality’s with others (L.A. Korostyleva) as a manifestation of human self, as a conscious purposeful process of opening and objectifying of essential powers of man (V.E. Galazhynsky), as the embodiment of man’s potential in a variety spheres of practical activities: work, game, cognition, communication etc (Tytarenko T.M)

To our point of view, it is necessary to differentiate the notions of “self-actualization” and “self-realization”. The first should be treated only as the innate tendency to development one’s own potential (A. Maslow) and the second – as practical implementation of this tendency by every man in external practical activity.

A special place has the question of self-realization in ontogeny. The sequence of stages forms a temporal structure of personality’s existence. Each stage represents a new level of development, which is complicated by the fact that many dimensions of personality’s life’s journey are interweaving by different lines of development, each of which has its own history.

The development of man as an individual (psychophysiological development), as a personality (social development) and as a subject of activity (kognitive development) continues during the whole life, that ultimately forms a man as unique integrity – individuality (B.G. Ananiev). These, combined, but at the same time different directions of personality’s movement in her development, determine changes in a person’s life path and its structures, determine the formation and self-determination of personality in each age period, influencing on the behavior and personal choices throughout her life path.

The problem of self-realization of old people was investigated by V.D. Alperovych, L. Antsyferova, Z.A. Butueva, A.L. Buryakovskyy, S.L. Frank, A. Krasnova, N.F. Shakhmatov, T. Tytarenko etc, who considered it in the context of the concepts of the way of life and the meaning of life. Almost of all mentioned authors emphasized, that the list of human needs in old age, in most cases is the same as in...
other age periods, but the structure and hierarchy of needs are changed, particularly, to the center of the motivational sphere are put forward such needs as creativity, self-realization, activation of life of old people, sense of community and, of course, healthcare.

The period of old age is the final stage of human life, it is important, that during this period a personality could feel, that her life still has a sense, which will help her to live actively and productively. It is well known that the idea of psychological age is relative, that the criteria of periodization age and life expectancy depend on the biological characteristics of the organism and social environmental factors.

Among social we separate such factors as: the character of work, level of provision of material goods and medical care, housing, the individual's attitude towards the society, objectivity and realism in assessing to the individual's capacity, the adequacy of the individual's choice of the social roles and one's place in society.

The biological factors include: endogenous (a set of internal resources of the human body: gender, heredity (genetic code), favorable or unfavorable inclinations) and exogenous (the conditions of the environment: natural and climat conditions of the environment, the environmental situation, the impact of solar radiation and so on).

There is no doubt that biological life is determined by its genetic constitution, but usually it is not fully realized because of the harmful effects of the environment. At the same time, biological life serves as a guide for the real sequel average life expectancy. The difference between these two values is the reserve, which can be realized by improving the conditions and life styles.

That’s why, still nowadays psychologists, gerontologists, physicians can not determine when the period of aging begins. Most of all (B. Przyhoda, E.B. Harlok, J. Birren, D.B. Bromley etc) consider, that it is – 60-65 years, but the others believe, that no one of calendar dates are unacceptable (I.B. Davyдовskiy), because aging is enormously an individual process. The most important psychological factor of aging is the acceptance by a personality to be old (N.F. Shakmatov).

One more important criteria, that indicates to the entry a man in the period of late maturity (age) is a social criterion, which is connected with the retirement of an official person.

However, different countries for different occupational groups, for men and women have different timescales retirement (55-65 years), so this criterion can not be taken as a basis for setting limits on which retirement occurs. Old age has no distinctly determined boundaries nor at early stage, neither at the final. It is a distinctly individual character.

Traditionally, period after 60 years was studied by herontology, because it was always considered as the time of aging, fading and retirement. At the same time it should be mentioned, that the period of late adulthood lasts rather long – from 60 to 75 years. A man in 60 years varies significantly from 75 years old person not only on the state of the health, but by the motivation, sense of life and self-realization. That’s why, the researchers usually devide late adulthood in two stages: first stage – “early old age” or "the third age", which lasts from retirement to 70-75 years and the second - "old age", which comes only after 70 years. That is why, those, who hasn’t reached 70 years, but preserved good health and are able to lead an active and independent life, to maintain oneself without assistance, should be considered as potential of productive part of retired seniors.

At the same time, it should be noted, that this period of ontogeny never was considered as a productive period in person’s development. Most people, who after 60 are retired, consider their professional career completed. It is happen because of many reasons. One of them is the stereotypical attitude to this period of age and to a person, who has reached 60.

Psychologists agree that attitude to people of late adulthood is more depended not from biological aging, but from social and psychological factors, including widespread social stereotypes. Among the most common social stereotypes about seniors are: conservative, eccentric, marasmic, weirdy, though traditionally the old age always was associated with wisdom and experience.

Most authors (V.D. Alperovich, B.G. Annan, D.Y. Raigorodski, M.V. Ermolaeva, G.S. Suhobska etc) also note, that the popular stereotypes about passivity and conservatism of seniors empirically are not confirmed, that retirement should not lead to the cessation of professional activity and exclude seniors
from society. If the life of a personality was meaningful and creative, her progressive development in old age doesn’t stop. Systematic long-scientific researches show that mental changes of seniors aren’t of personal character. With the losing of physical strength, the elderly persons retain the ability to grow as a personality.

Victor Frunkl has rightly pointed out, that the man, who spent a fruitful life, wouldn’t become a decrepit old man, but rather, his mental and emotional qualities that are developed throughout the life, are saved despite of the fact, that his physical forces become weak.

Eventually, modern society, which is undergoing a severe economic crisis, on the one hand, understanding the value of such an experience of seniors, is trying to use the practical knowledge and worldly wisdom of elderly people, but on the other - excludes them from the system of active social activities. But modern society, that considers itself civilized, has no right to ignore personal problems of the excluded from it old people.

Today there are several theories of age and aging that interpret the state, feelings, inner world of the elderly and their attitude towards the situation in society.

One of the most developed theories, explaining the situation of the excluded older people is the "the theory of separation", which first was described by J. Rosen and B. Nyuharten and later was supplemented by E. Cumming and W. Henry. The essence of the theory is that in old age a person changes the motivation, in particular, each person in this age is focused on her inner world, and her interest to communicative activity is decreased. Formally, loss of social ties begins with retirement and objectively is manifested in the fact that a person loses previous social roles, her income is reducing and she is going through loss of family or separation from family. Subjectively, a person feels unnecessary and focuses in her inner world. Distancing from society, according to the authors, is the most adaptive and successful mode of existence in old age. This theory reflects the view of aging as a period of involution, whereby man becomes unclaimed in society. Just this theory is called the "theory of liberation" (alienation) because the aging and retirement allegedly makes an elderly man "free" from all obligations to society. The most unfortunate of its that the representatives of this approach consider of the elderly man unnecessary in society and take it as a norm.

Quite opposite to the previous theory is "the theory of activeness", which stresses that the natural desire of a man is the preservation of relationships with society, and the real reason of severance of the elderly with society is the society’s refusal from collaboration with old people.

But in fact, as it is proved by the different researchers, the peculiarity of inner world of seniors is the parallel existence of two orientations: the first - desire for union, need to feel socially popular, meaningful and use full, the second - the desire for autonomy, peace, self-sufficiency.

However, people, who have retired and who doesn’t consider themselves old, feel the need to work as well, as the people who did not enter the retirement age. Work gives meaning to life of an elderly person, promotes a positive self-perception, because even in retirement age people feel the need to continue activity. That brings them a sense of life satisfaction. The exclusion of the elderly from "mainstream" and of active social life by age is associated usually with the limitations of their social space and social activities.

Retirement means losing ties with the reference group, loss of the case, to which a personality devoted her entire life, loss of important and meaningful for her social role, compounded by the loss of social and psychological incentives, destruction of professional and interpersonal relationships. Disappointment and depression, doubt and indifference of surrounding people block actualization of potential experiences, prevents the accumulation of new achievements.

But, despite of the difficulties, connected with the losing of work, people can’t get rid of their inner social nature, which manifests in the need to realize their "I" in the social activities and the need to be valued by the society for their activity. The conflict between personal desire to be active and the necessity to retire actualizes the problem of self-realization in the elderly and encourages the state to find the relevant system solutions for restoration of social activity of the retired, recovering of social capital and connections, which are basic conditions for self-realization. The peculiarities of social exclusion of seniors are that it is accompanied with ageism - the exclusion by age criterion, which can
affect everyone while achieving the elderly. Today it is difficult to find a job for a person, who has reached even 35 years, to say nothing about pensioners. That is because the professional experience today is valued less, than the modern education.

The great experience and ability to examine the life and events in it in different coordinate systems allows the elderly people find a new occupation, to try to realize themselves in a new work, take part in a new social or any other kind of activity and build a productive life after retirement. New cognitive formations and positive experience, that are inherent to the personality in late adulthood, such as dialectical thinking (K. Rigel), wisdom (E. Erickson, P. Baltes) indicate to a high level of integration and integrity of the individual's and their ability to fulfill complex kinds work with different level of intellectual tasks, to give useful advices on vital issues. But society treats the elderly as the objects of influence that require care and maintenance. The society does not want to see in senior people socially active business partners that seek to satisfy their life important needs through collaboration with various social institutions and organizations, to develop their skills and take responsibility for their actions and decisions.

The responsibility for a successful return of the excluded people to the social stream depends both as from society, so from the individual.

One of the ways of overcoming of social exclusion of seniors is education, which in the condition of the development of modern society, the blurring of boundaries between the generations, in the conditions of the rapid “aging” of knowledge and transformation of major social institutions has become one of the main social and personal needs, which demands integrity of personality and of society and leads to self-realization.

In general, self-realization is a purposeful activity of a personality aimed at the transformation of reality and herself through the recognition by others, in co-creation with others and society as a whole. Self-realization of the elderly persons assumes the maximum use of the accumulated experience and knowledge. Transforming activity involves moral and volitional effort aimed at the object, with a view to improve it. Self-realization of an elderly person can be committed in one or several areas at the same time. On this ground we can distinguish the following types of self-realization of the elderly people: the professional self-realization, spiritual self-realization, cognitive self-realization, creative self-realization, self-fulfillment in the family, self-realization in social activity, communicative self-realization. But the problem lies in the fact that the field of self-realization of an old man is limited due to social exclusion. That’s why, we can select a number of types of social exclusion: social exclusion in the professional sphere, social exclusion in the material sphere, social exclusion in everyday life, social exclusion in the spiritual sphere, social exclusion in the field of education, social exclusion in the family, social exclusion in the public sphere and others. To overcome barriers, created by social exclusion, it is necessary to form the appropriate conditions that affect the self-realization of an elderly person. Among them should be taken into account the conditions, concerning the self-development of personality: 1) the integrity and personal development; 2) the purpose of life; 3) the value orientations; 3) adaptive capacity (resources); 4) social capital; 5) the one or some spheres of activity; 6) professional skills and competence; 7) capacity to self-education.

The excluded old personality will get a chance to come back to active life and realize herself and her potential during the elderly period of life if she try to continue her education and keep close to social and cultural life, to include in the process of informationalization and computerization, to develop her social networks, increase social capital, ultimately leading to self-realization. Education of elderly is a tool for the preservation and revitalization of self-realization. The idea of continuing education figures prominently in a number of progressive ideas of the XX century. Human and philosophical significance of this idea is great because its meaning is to provide everyone with the development, self-improvement, creative renewal, cognitive self-realization of lifelong learning, which means the active presence in the mainstream. Education in today’s society is one of the four (together with income, power, and prestige) criteria of human capital.

At the same time, the problem of aging which worries not only economists, gerontologists, but also psychologists, because the older generation is very difficult to cope with the rapid growth of scientific
and technological progress. Especially, it touches the representatives of professions, whose work is connected with intellectual activity, whose knowledge needs to be updated because it does not meet the standards of our time. It is not easy for them to learn to work with computer and to keep up with technologization, informatization and computerization of the production process itself.

In addition, aging is accompanied by a variety of physical and psychological illnesses, which impose restrictions to the ability of a person of this age work productively and satisfy one’s everyday needs.

That is why the main tasks, facing psychologists, heronto-psychologists, social psychologists, social workers are - to help seniors to adapt to age-related physical, physiological and social changes. First of all, to help them to form an adequate perception of their own age and aging, to develop the ability intelligently allocate the time and to use productively the years, which have remained, to form in oneself the ability of resisting to affective impoverishment, maintain the emotional flexibility, internal cohesion and meaningful perception of life, to develop the ability of resisting of the social stereotypes about older people, in particular, regarding of their physical, occupational and social activities, of their place in society, possibilities of their development and self-realization.

Self-realization is a way of man’s existence. It never stops. Social and psychological development of man is not limited in any age period. Development is a continuous process. A man is realizing himself during the whole life.

One of the main factors, that keeps the progressive development of personality in old age is meaningful, creative life in all stages. The important factor for productive aging is - the ability of a personality to integrate her experience, its past, present and future, including the successful solving of regulatory management, life challenges and conflicts during the whole life. Late adulthood is not exception, but it has its specificity, which is connected with influence of age and retirement. One of the ways of overcoming the social exclusion of old people is self-education.

Social exclusion in old age is accompanied by ageism – the exclusion by age criterion. The main ways for self-realization in old age are: self-education in professional or social activities, especially in the University of the Third age, self-realization in family, in maintaining a healthy lifestyle, in the development of new forms of leisure and creative activity.

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Address: Olesya Koropetska, Vasyl Stefanyk Precarpathian National University, 57, Shevchenko Str., Ivano-Frankivsk, 76025, Ukraine.
E-mail: olesya-ko@mail.ru.
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