



Национальный исследовательский университет «Высшая школа экономики»
Программа дисциплины «Развитие в стареющем обществе» («Ageing society and development»)
для направления/ специальности 38.04.04 «Государственное и муниципальное управление»
подготовки магистра для магистерской программы «Население и развитие»

Правительство Российской Федерации

Федеральное государственное автономное образовательное учреждение высшего профессионального образования "Национальный исследовательский университет "Высшая школа экономики"

Факультет социальных наук

Программа дисциплины «Старение населения: социально-экономическая реальность и перспективы.» («Population ageing: socio-economic reality and perspectives.»)

для направления/ специальности 38.04.04 «Государственное и муниципальное управление»
подготовки магистра для магистерской программы «Население и развитие»

Автор программы:

Ермолина А.; Козлов В.А., к.э.н.; Лежнина Ю., к.с.н.; Миннигалева Г., к.п.н.,
e-mail: aermolina@hse.ru, vakozlov@hse.ru, jlezhnina@hse.ru, gminnigaleeva@hse.ru

Одобрена на заседании кафедры [Введите название кафедры] «__»_____ 20 г
Зав. кафедрой [Введите И.О. Фамилия]

Рекомендована секцией УМС [Введите название секции УМС] «__»_____ 20 г
Председатель [Введите И.О. Фамилия]

Утверждена УС факультета [Введите название факультета] «__»_____ 20 г.
Ученый секретарь [Введите И.О. Фамилия] _____ [подпись]

Москва, 2017

Настоящая программа не может быть использована другими подразделениями университета и другими вузами без разрешения кафедры-разработчика программы.



1. Scope of Use

The present syllabus sets up minimal requirements and course objectives for students, defines the content of lectures and seminars and lays out students' evaluation criteria. The course is designed for professors teaching this course, their teaching assistants and HSE MA students elected this course.

The syllabus meets:

The course is taught on the 1st year within MAGOLEGO (Elective Courses)

2. Learning Objectives

The aim of the course is development of students' knowledge of the major sociological and economic scientific approaches to the analysis of development in ageing societies. The course pays special attention to linkage between the types of society and models of its development and instruments of social policies focusing on further development of the country.

In general student receives a wide range of knowledge about ageing and its impact on social and economic development.

The course is taught in English.

3. Student Competences

Students' competencies expected by the end of the course:

Competence	Code	The level of competence formation	Descriptors - the main features of development (indicators of results achievement)	forms and methods of teaching that promote the formation and development of competence	The form of control of competence formation results
Is able to work with the information: find, assess and use information (from different sources) that is needed for solving scientific and professional problems (including those ones based on the system approach)	УК-5	СД, МЦ	learns lecture material, reads compulsory literature for seminars and participates in seminar discussions, attracts several scientific literature sources for preparing an essay	attending lectures, preparation for seminars and work at them, writing an essay	evaluation of the work at seminars, assessment of the text of the essay
Is able to critically comprehend, synthesize, analyze professional information	ПК-2	РБ, СД	reads compulsory literature for seminars and participates in seminar discussions, provides detailed argumentation in text of essay and tasks	preparation for seminars and work at them, writing an essay	evaluation of the work at seminars, assessment of the text of the essay
Is able to work in team	УК-7	СД, МЦ	Takes part in preparing team-tasks	preparation for seminars and work at them	evaluation of the work at seminars
Is able to analyze socially significant problems and processes with impartiality and scientific objectivity	ПК-3	РБ, СД	Takes part in preparing tasks for seminars, prepares an essay	attending lectures, preparation for seminars and work at them, writing an essay	evaluation of the work at seminars, assessment of the text of the essay
Is able to solve standard tasks of professional activities on the basis of bibli-	ПК-1	СД	prepares an essay	writing an essay	assessment of the text of the essay



ographic information and culture with the use of information and communication technologies, and taking into account the main information security requirements					
---	--	--	--	--	--

4. The Course in the Structure of the MA program

This discipline is a part of the HSE Elective courses system MAGOLEGO. The discipline is optional for master students of "Public Administration" department. The discipline is organized at the **1st year**

5. Course Outline

Course Length: 2 modules

№	Topics	Course Hours	Academic Hours		Self-study Hours
			Lectures	Seminars	
1	Worldwide population ageing trends. Biology of ageing	24	4	4	16
2	Social and psychological aspects of ageing	20	4	4	12
3	Economic aspects of ageing	40	8	8	24
4	Active ageing	20	4	4	12
5	Exam	10			10
	Off-line part in sum:	114	20	20	74

6. Forms of Control

Essay, colloquium, class work.

7. Grading Criteria

Essay is revised by lecturer and is provided with individual feedback and score. Assessment of assignments is guided by the following criteria:

- problem statement
- own position of the author
- arguments supported by facts, data, research
- policy recommendations

During the colloquium of the student:

- uses basic knowledge of the human sciences;
- demonstrates the ability to collect, process and interpret data from different social and demographic problems using appropriate methods;
- implements knowledge of the social and human sciences' methods and theories to analytical work;
- develops personal recommendations to the socio-demographic challenges and development;
- demonstrates the use of sociological methods for the analysis of socio-economic problems;
- shows the potential implementation of the social assessment bodies planning decisions.

Estimates of all forms of control are set on a 10-point scale.



8. Course Content

Topic 1. Social and psychological aspects of ageing

TOPICS

1. Psychological development in older age. Losses and gains of the old age. Life-course approach.
2. Changes in social context and coping with them in older age. Changing of family relations and networks. Strategies of work and retirement in older age.
3. Age discrimination and ageism. Stereotypes, expectations and perceptions of older age.

Read before class

1. Whitbourne, S K. (2002). *The aging individual: physical and psychological perspectives*. New York: Springer Publishing Company, Inc.

Chapter 1. Models of Identity and the Aging Process

2. Sousa, L. (2009). *Families in Later Life : Emerging Themes and Challenges*. New York: Nova Science Publishers, Inc.

Chapter. Constructing family integrity in later life

3. Harrington, C. L., Quinn, K., Raphael, A., Martey, R., Marshall, B. L., Marshall, L., & ... Claessens, N. (2014). *Aging, Media, and Culture*. Lanham: Lexington Books.

Chapter 4. Reflections of Old Age, Constructions of Aging Selves

4. Morgan, L. A., & Kunkel, S. (2011). *Aging, Society, and the Life Course, Fourth Edition*. New York: Springer Publishing Company.

Chapter 4. The Aging Individual in Social Context

Chapter 6. Work and Retirement in the Life Course

1. Questions for discussion¹

2. To what extent do you feel constrained by age norms and life course expectations? How aware are you and your friends of these expectations?
3. Do you think that the stages of human development in later life (such as gerotranscendence and elderhood) are possible to achieve only when we are old? Why or why not?
4. How do societies “use” age? Why does chronological age make any difference whatsoever in our lives? Give some examples of the ways in which social definitions of age, including ageism, have affected your life (or someone you know well).
5. Thinking about people in their 20s today, what changes in the timing of family events, family norms, and individual behaviors are likely to differentiate their cohort experiences of family life from those of individuals in their 70s today?

¹ Morgan, L. A., & Kunkel, S. (2011). *Aging, Society, and the Life Course, Fourth Edition*. New York: Springer Publishing Company. P.



6. Defining work as paid employment has implications for how society views other activity and rewards (or fails to reward) it. What consequences would arise and which groups would experience the most change if we broadened our definition of and recognition for work beyond the paid labor market to other kinds of unpaid, productive activity?
7. Employer pensions have been a cornerstone of enabling large numbers of people to fully withdraw from employment at retirement. As pensions become less available and baby boomers show some hesitancy to retire, consider whether they'll be able to find good-quality employment through bridge jobs. What are the barriers and benefits for an employer to hire a recent retiree?
8. David Ekerdt points out what he views as a mainstream adaptation to retirement in his concept of the "busy ethic." What constitutes a "good retirement," and does society currently enable all people opportunities to achieve a good retirement?
9. Respond to the statement that "You are only as old as you feel." Do you agree or disagree? What are some of the things that influence how old we "feel"?
10. What are some of the causes, consequences, and solutions to ageism? Do you speak up if you hear ageist remarks? Why or why not?
11. Browse through a birthday card selection, taking note of cards that are designed for different ages. What is your reaction? How are the messages of the cards different, based on the age group for whom they are intended? What makes a birthday card funny?

Class 2.

TOPICS

1. Global ageing. Institutional reforms in ageing society. International frameworks for ageing societies. Country level response to ageing.
2. Social services and social welfare in old age. Community care. Institutional care. Family care.

Prepare for class a short presentation (5-7 min max) about care and services available for older persons in your country/region. You can structure your presentation around the system, or particular services which impressed you. This assignment is for group work or individuals. Sign up in a google form. The link to the form will be sent a week before class.

Read before class

1. Morgan, L. A., & Kunkel, S. (2011). *Aging, Society, and the Life Course*, Fourth Edition. New York: Springer Publishing Company.
Chapter 8. Aging and Health: Individuals, Institutions, and Policies
Chapter 10 Global Ageing
2. Victor, C. (2005). *The Social Context of Ageing: A Textbook of Gerontology*, Routledge, Abingdon, Oxfordshire, 368 pp.
Chapter 10. Services for older people
3. Timonen, V. (2008). *Ageing Societies : A Comparative Introduction*. Maidenhead, England: McGraw-Hill Education.
Chapter 7. Care services for older people I: informal and formal. Chapter 8. Care services for older people II: community and institutional care

Review international documents

4. Vienna Plan on Ageing



5. Madrid Plan on Ageing
6. Age-friendly cities: the Guide
7. Active Ageing Policy Framework

Questions for discussion²

1. Speculate on the likely changes to later life that may be brought by the large cohorts of the baby boom. What have their cohort experiences suggested about this large age group that may transform later life?
2. Many public colleges and universities [in the USA] have a policy that allows older people (usually age 60 and above) to audit classes at no charge. Have you had [or been] an over-60 student in any of your classes? What were your reactions and the reactions of others? If you have not yet had this experience, how do you imagine you would react?
3. What generation do you belong to? What are the characteristics that are typically ascribed to your generation? Do you think that these attributes fit you and your age peers well? Do you have any negative reactions to being classified as a member of a particular generation, such as Gen X, millennial, or any other generation?
4. Proponents of generational equity contend that the United States should move toward need-based entitlements rather than age-based ones. What major programs would this influence? How would changes in these programs to need-based entitlement influence your neighbors, family, and friends?

Class 3.

DISCUSSION TOPICS

3. The role of the third sector in social welfare and social services for older people.
4. Membership organizations of older adults and their contribution to the society. Civic engagement, giving and volunteering in older age.

Prepare for class a short presentation (5-7 min max) about a membership nonprofit organization or human service/human rights organization for older people from your country. You can structure your presentation around international networks or particular services, or practices, which impressed you. This assignment is for group work or individuals. Sign up in a google form. The link to the form will be sent a week before class.

Read before class

1. Timonen, V. (2008). *Ageing Societies : A Comparative Introduction*. Maidenhead, England: McGraw-Hill Education.
Chapter 9. Exercising power and challenging attitudes
2. Minnigaleeva G. A. (2014). From age-friendly research to age-friendly city and age-friendly regional network: case of Tuymazy and Republic of Bashkortostan, Russian Federation. *HSE Working Papers*,



3. Chan, R. H., Zinn, J., & Wang, L. (2014). *Social Issues and Policies in Asia : Family, Ageing and Work*. Newcastle upon Tyne: Cambridge Scholars Publishing.
Chapter 5. Active ageing and senior volunteering in Hong Kong
4. Older people as voters, citizens and changemakers (2015). S.I.: Emerald.
Chapter. A world of social interaction for all
Chapter. An age of opportunity for a voluntary sector.

Questions for discussion³

1. College campuses are increasingly emphasizing service learning for students, in which coursework is supplemented with active engagement with the community in a project that does public good. Does this seem to be the same as civic engagement for older people? Do you think that such expectations are fair, reasonable, and beneficial? How important to you and to your community is your involvement in the public and political life? Should baby boomers be required to participate in civic engagement?
2. Think about or discuss with others the reasons people choose to vote or not to vote (including reasons not to register). What are the major themes that appear to be central for young adults compared to people of other ages? What are the implications for public policy if fewer young than older people continue to vote in upcoming elections as the population ages?
3. Think about differences between services provided for older persons by the government and non-profit organizations. What are the advantages and disadvantages of both?
4. What global or country wide membership organizations for older persons are you aware of? What are their missions? How do they achieve it? What role do older people play in these organizations?
5. How important is volunteering for older people? What can they contribute to others? Think of older people you know. How do they volunteer formally or informally? How do they participate in community life? What are benefits of volunteering for older persons? What are the benefits for society?

Written assignment for this section

Choose 1 of the following tasks. Write an essay to answer the questions. Use readings recommended for the section to support the trends you have identified and strengthen your arguments. 2500-3000 words. The assignment is due 1 week after the last class of the section. Each day of delay entails 20% decrease in grade.

1. Identify three societal problems where the energies of retired adults might be put to good use to help society in “encore careers.” Outline the kinds of programs that might attract these individuals to contribute to their communities, states, or countries. What challenges would such programs face?
2. Given how many of them there are, you probably know some aging baby boomers. Do they challenge the stereotypes you may have had about older adults? Think of some specific examples of baby boomers that you have read about, seen in the media, or know personally who help to dispel negative myths about aging.
3. Family caregiving for an ailing or frail older relative provides both burdens and rewards. What new supports can you imagine that would promote caregiving to shift the balance toward greater rewards?



4. If you were working for a service provider planning for the future needs of the elderly, what steps would you recommend right away based on what we know about changes in the older population? What specific changes are going to be most important to those planning for service needs?
5. Informally interview a handful of people and ask them some specific age norm questions, such as the age at which a person should be settled into a career, or the age at which they expect to marry (if at all). What do these findings tell you about the power of age norms?
6. Do some genealogical sleuthing and map out the structure of your family tree. Examine such things as the number of siblings in various generations/historical periods and ages at marriage and at death. What larger social changes in the institutions of the family do you see reflected in the history of your own family?
7. Given how many of them there are, you probably know some aging baby boomers. Do they challenge the stereotypes you may have had about older adults? Think of some specific examples of baby boomers that you have read about, seen in the media, or know personally who help to dispel negative myths about aging.
8. Now that you are more educated about the complexities of aging, what steps can you take right now to maximize a “good old age” for yourself, including the avoidance of “pathological aging”? Make up a personal aging plan for yourself. Answering this question requires you to consider what makes for successful aging according to your value system.

Grading

Grade for the section will be comprised of 20% in class participation, 40 % presentations, 40% written assignment

Topic 2. Economic aspects of ageing

Class 1. Labour markets of the ageing societies.

Literature:

Clark R. (2004) *The Economics of an Aging Society*. Wiley-Blackwell.

Schulz J.H. (2001). *The economics of aging* (7th ed.). New York: Auburn House.

Walker A.A. *European perspective on quality of life in old age* // European Journal of Ageing. 2005. Volume 2. Number 1.

Auerbach, A.J., J. Cai, and L.J. Kotlikoff, 1991. *U.S: demographics and saving: predictions of three saving models*. Carnegie-Rochester Conference Series on Public Policy 34.

Creedy J., Guest R. (2007) *New developments in the economics of population ageing*. Edward Elgar Pub.

World Report on Ageing and Health (2015). World Health Organization.

Kvist J. (2015) *A framework for social investment strategies: Integrating generational, life course and gender perspectives in the EU social investment strategy* // Comparative European Politics. Volume 13, Issue 1, pp 131–149.

Class 2. Economic behavior (consumption, savings, investments including human capital investments) and its correlation with perspectives of ageing societies.

Literature:

Walker, A. (1990). *The economic 'burden' of ageing and the prospect of intergenerational conflict*. *Ageing and Society*, 10 (4).

Clark R. (2004) *The Economics of an Aging Society*. Wiley-Blackwell.



Creedy J., Guest R. (2007) *New developments in the economics of population ageing*. Edward Elgar Pub.

Morrow-Howell, N., Hinterlong, J., & Sherraden, M. (2001) (Eds.), *Productive aging. Concepts* Schulz J.H. (2001). *The economics of aging* (7th ed.). New York: Auburn House.

Henkens K., Remery C., Schippers J. (2008) *Shortages in an ageing labour market: an analysis of employers' behaviour* // The International Journal of Human Resource Management Vol. 19, Iss. 7.

Serban A.C. (2012) *Ageing Population and Effects on Labour Market* // Procedia Economics and Finance. Volume 1, Pages 356-364

Class 3. Migration: advantages and disadvantages for the ageing societies. Ageing in a context of demographic transition and immigration (regional forecasts). Intergenerational transfers: driver of brake for the development in ageing societies.

Literature:

National transfer accounting <http://www.ntaccounts.org/web/nta/show/>

NTA Bulletins 2, 3, 10 <http://www.ntaccounts.org/web/nta/show/NTA%20Bulletin>

Topic 3. Active ageing

Active ageing indexes and additional measurements of ageing. Institutional reforms in ageing societies (evidence from Russia)

Literature:

Active Ageing Index Home <https://statswiki.unece.org/display/AAI/Active+Ageing+Index+Home>

Active Ageing report. Special Eurobarometer 378 (2012)
http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_378_en.pdf

European commission Active ageing <http://ec.europa.eu/social/main.jsp?catId=1062>

WHO "Ageing and life course" http://www.who.int/ageing/active_ageing/en/

9. Educational technologies

Forms of the class activities: collective, group, individual.

Forms of the home activities: group (team), individual.

Collective forms of activities involve the RS lecturer and all students into a single process. Group (team) forms of activities involve students into a close collaboration to study cases, answer the questions for the lecture in team, prepare group assignments.

10. Tools for monitoring and student evaluation

10.1. Topics of Essay (for further specification)

1. Raising the retirement age
2. Generations competition for social infrastructure
3. Generations competition for positions in the labour market
4. Employer/ Family/ Community as a side losing from ageing
5. Active ageing as a policy priority
6. Ageing government/ management in private sector
7. Life without state pension system
8. Education system reaction to ageing
9. Ageing labour force
10. Measuring ageing
11. Living together with elderly relatives: economic effects for different sides



10.2. Questions for Colloquium

1. Ageing: reasons, , regions specifics, projections
2. How to measure population ageing
3. Ageing as a biological process. Physical and mental ageing
4. New technologies and ageing. Perspectives and limitations.
5. Ageing as a reason for migration: pluses and minuses of migration in ageing societies
6. Ageing and internal migration (urban-rural) through time
7. Health and productivity at the elder age
8. Limitations for raising retirement age
9. Pay-as-you-go pension systems and conditions of their implementation
10. Fully funded pension systems and conditions of their implementation
11. Gender inequality of ageing and its effects
12. Ageism as a social problem
13. Ageing labour force as a resource
14. Ageing labour force as a limitation
15. Cross-national inequality of ageing
16. Rural ageing: reasons, specifics, results
17. Ageing as a reason of markets transformation
18. Common problems of elderly population
19. Inequality among elderly
20. Ageing of aged: reasons, conditions, effects
21. Intergenerational transfers in aging population

11. The procedure of final grading

The assignment is devoted to the part “Social and psychological aspects of ageing”

Other 60% of the mark include the activity for the Topics “Economic aspects of ageing” and “Active ageing”

The off-line part assignment are not obligatory, but if the students wish to follow them, up to 50% of the colloquium mark could be covered by them.

The teacher evaluates the students work on lectures, the activity of students in discussions, simulations etc. The marks for work on lectures are put in the work sheet.

The colloquium is carried out in the form of oral talk.

Final score is calculated by the following formula:

$$O_{final} = \max [0, 2 \cdot O_{class\ work} + 0,45 \cdot O_{Colloquium} + 0,35 \cdot O_{Assignment}]$$

All scores are rounded according to arithmetical laws.

12. Course materials

Literature

1. Jennifer Couzin-Frankel (2011) “A Pitched Battle Over Lifespan”, Science (July 29) pp.549-550.
<http://www.sciencemag.org/content/333/6042/549>
2. Dennis Normile (2011) “The Upside of Downsizing”, Science (July 29) p.547.
<http://www.sciencemag.org/content/333/6042/547>
3. Alicia H. Munnell (2011) “What Is the Average Retirement Age?” Center for Retirement Research, Boston College (August, Number 11-11), pp.1-7.
http://crr.bc.edu/wpcontent/uploads/2011/08/IB_11-11.pdf



4. Jonathan Gruber and David Wise (1998) “Social Security and Retirement: An International Comparison,” *American Economic Review* (May) v.88 n.2, pp. 158–163. <http://www.jstor.org/stable/116911>
5. National Research Council and National Academy of Public Administration. (2010). “Options for Social Security”, Chapter 6 in *Choosing the Nation’s Fiscal Future*. Committee on the Fiscal Future of the United States. Washington, DC: The National Academies Press. Pp. 105–128.
6. http://www.nap.edu/openbook.php?record_id=12808&page=105
7. A.V. Chayanov, *The Theory of Peasant Economy*, Daniel Thorner et al translators, (University of Wisconsin Press, 1986; originally 1925); pp. 53-81.
8. Ronald Lee and Karen Kramer (2002) “Children’s Economic Roles in the Context of the Maya Family Life Cycle: Cain, Caldwell, and Chayanov Revisited,” *Population and Development Review*, 28 (3):475-499 (September 2002).
9. Andrew Mason and Ronald Lee (2011) “Population Aging and the Generational Economy: Key Findings”, Chapter 1 in Lee and Mason, *Population Aging and the Generational Economy: A Global Perspective*, Edward Elgar, pp.3-31
10. Gary S. Becker and Kevin M. Murphy (1988), “The Family and the State,” Supplement to Chapter 11 in *A Treatise on the Family (Enlarged Edition)*, Harvard University Press, reprinted from Gary S. Becker and Kevin M. Murphy (1988), *Journal of Law and Economics*, April, pp. 1-18.
11. David Cutler, James Poterba, Louise Sheiner, and Lawrence Summers (1990) "An Aging Society: Opportunity or Challenge?" *Brookings Papers on Economic Activity* v.1, pp.1- 56 and 71-73.
12. Clark R. (2004) *The Economics of an Aging Society*. Wiley-Blackwell.
13. Schulz J.H. (2001) *The economics of aging* (7th ed.). New York: Auburn House.
14. Clark R.L. and Spengler J.J. (1980) *The Economics of Individual and Population Aging*. New York: Cambridge University Press.
15. Creedy J., Guest R. (2007) *New developments in the economics of population ageing*. Edward Elgar Pub.
16. Holzmann R. and Palmer E. *Pension Reform: Issues and Prospects for Non-Financial Defined Contribution (NDC) Schemes* <http://siteresources.worldbank.org/INTPENSIONS/Resources/NDC_English.pdf>
17. Lloyd-Sherlock P. (2010) *Population ageing and international development: from generalisation to evidence*. Policy Press.
18. Lloyd-Sherlock P. (ed.) (2004) *Living longer: ageing, development and social protection*. Zed Books.
19. Morrow-Howell, N., Hinterlong, J., & Sherraden, M. (2001) (Eds.), *Productive aging. Concepts and challenges*. Baltimore, London: Johns Hopkins University Press.
20. Onofri P. (2004) *The economics of an ageing population: macroeconomic issues*. Edward Elgar Pub.
21. Walker A.A. European perspective on quality of life in old age // *European Journal of Ageing*. 2005. Volume 2. Number 1.

13. Technical requirements for the seminar

Projector, laptop, screen, whiteboard.