**Annotation**

**TOR-16**

Topic: “The analysis of social and economic inequality and redistribution policy, evaluation of the standard and quality of life of various social groups, and the research of the factors of healthy and active ageing”

Principle Investigator: O.V. Sinyavskaya

Unit: Institute for Social Policy

**The object of this study** is Russian households and population, social and tax policy, active and healthy ageing.

**The objectives of the project** include studying the dynamics of the living standards and quality of life of various social groups, social stratification of Russian society, in particular during economic changes in 2014-2015, the main distribution channels of macroeconomic shocks, a complex analysis of the level and factors of socio-economic inequality and an estimation of the redistribution effects of social and tax policy, as well as the research of healthy and active ageing factors. The independent research focus is the study of gender inequality in the distribution of responsibilities in the family and gender characteristics in the perception of the indicated inequality. This project continues the study started in 2013-2016.

For the objectives of the project the following **methods** were used: desk research, theoretical and methodological analysis of Russian and foreign publications; descriptive, multivariate statistical and econometric analysis of micro-data from sample population surveys; analysis of qualitative sociological data; methods of social stratification and typology; microsimulation and macrosimulation modelling.

**The empirical base of the research** includes: the “Russian Longitudinal Monitoring Survey” (RLMS-HSE) 2000-2016, the “Comprehensive monitoring of living conditions” (CMLC) 2011 and 2014 by Rosstat, the “Selective supervision of use of daily fund of time by the population” 2014 by Rosstat, the “Moscow and Muscovites” survey 2014, European Social Survey (ESS) 2012 and 2014, monitoring data of the Institute of Sociology of the Russian Academy of Science (IS RAS) 2015, the survey "Man, Family, Society" (MFS) 2015 by the Russian Presidential Academy of National Economy and Public Administration (RANEPA), a survey “The population perception of socio-economic changes in modern Russia” 2017 by the Institute of Social Policy of the Higher School of Economics (ISP HSE), etc. In some cases, the results of qualitative research, such as the transcripts of MFS survey interviews and the results of focus groups conducted by HSE in 2017 were used.

**The main results:**

1. The analysis of the structure of total public expenditures on social protection of the population in the Russian Federation for 2006-2015 has shown, firstly, that the growth of financing in the sphere of social protection that has renewed in 2015 was achieved by one third not by a real increase in social security spending, but by “conditional” expenses, namely, the transfer of pension savings from the Pension Fund to Non-Government Pension Fund. Secondly, in the structure of expenditures on social protection of the population, the contribution of pension provision is gradually growing with a relative decrease in expenditures elsewhere. Thirdly, in the system of non-insurance measures of social support, the ratio between expenditures on categorical and targeted measures remains at the same level, despite the declared priority of the means test and some progress in the regional social policy.
2. The results of the empirical evaluation of social and fiscal policy impact, the determinants of social stratification and life cycle events on the probability of being poor for women with children in European countries have showed that countries with a low poverty rate among mothers after the childbirth have obvious pro-natalist orientation and social-democratic welfare state regimes. High poverty rate among mothers after the childbirth has observed in pro-traditional and conservative countries, and especially in countries with a liberal regime. Similarly, high risks of mothers’ poverty after divorce have observed in liberal and southern European countries while countries with socio-democratic and pro-natalist regimes had the lowest rates of mothers' poverty after a divorce. The existence of a social gradient of mothers' poverty in the case of childbirth and divorce reinforcing intercountry differences is acknowledged. Lower mothers’ social class effects have observed in countries with a high level of defamilization (social democratic and pro-natalist regimes). Higher effects were in the liberal (UK), post-socialist and southern European welfare states.
3. The study of the poverty dynamics of the population during the influence of the current crisis and the characteristics of sharply impoverished Russians has showed that the key social policy issue in Russia nowadays is a significant percentage of the population living at the risk of poverty even in stable economic conditions, rather than a group of poor population by itself. Precarisation and a high dependent burden in their households are the main features of sharply impoverished Russians.
4. During the 2000s there was a stable growth of the share of the middle class in Russia. However, compression of the middle-class core has been observed since 2010. In 2015, there has been some decline in the proportion of generalized middle class. In the context of the latest crisis the changes in the proportions of the middle class were not dramatically, although there was some decline in the proportion of the middle class, not only due to the criterion of material security, but also due to social and professional status. Self-identification continues to be the main identification criteria even in the crisis. The main achievement over the 2000s has been the “convergence” of groups with different social and professional status and self-identification of the middle class. At the same time, high mobility of the middle class was observed during 2000-2015. The composition of the generalized middle class has changed by the inflow of new households and the outflow vector, as the size of the generalized middle class increased significantly.
5. The study of the main approaches to defining and measuring of quality of life and well-being in old age has shown that two types of social indicators are currently used to measure and monitor the quality of life of the elderly: objective and subjective, which reflect the objective and subjective components of the quality of life. Subjective well-being of older people is measured by life satisfaction, the elderly’s feelings or emotional states, and psychological functioning. One approach to measuring the quality of life that has been intensively developed is the index approach, which is especially popular in international comparisons. There are three major ways to include indicators in indexes: orientation to subjective evaluations, the use of objective indicators and the approach that involves both methods in different proportions. The most common indicators of indexes measuring the elderly’s quality of life can be divided into the following categories: life expectancy and health; education and access to information; employment and features of work; income, wealth and property; political participation; social connections and relations, social activity; the state of environment; security; life satisfaction; gender and social equality. Based on the results of the desk study and the study of the empirical databases available in Russia, a list of indicators was identified and general methodological approaches to developing a Russian index characterizing the quality of life and well-being of older people were developed.
6. The results of the multilevel (hierarchical) analysis of the impact of social activity on the older persons’ subjective well-being in different countries have indicated that social contacts have a strong effect on subjective well-being, which varies significantly between countries. The study of the contribution of intergenerational contacts to Russian elderly’s subjective well-being has shown that high levels of life satisfaction and happiness are typical for the elderly who have been aid donors in intergenerational transfers. The positive effect may be explained by the fact that helping their relatives (parents, children, or grandchildren) older persons feel their importance and the meaning of their life.
7. The results of the comparative analysis of the European Social Survey data have showed that bad habits of Russians and European elderly are similar. However, the level of preventive health activity of Russians is much lower than that of their Western peers, and is significantly differentiated across socioeconomic groups. Older Russians face less access to medical care and less often discuss their health problems with their doctors, especially disease prevention. Russia differs from European countries in poor nutrition, a lack of physical activity and overweight problems of older population. The results of the comparative analysis of the RLMS-HSE data have showed that there is less diversity in healthy life-styles among the elderly than among the population as a whole. Basic style, characterized by a restriction of both bad habits and health promotion activities, is common for over half of the elderly. This is largely due to limited income. The results partly confirm William Cockerhams’ health lifestyle theory: a higher social status is combined with a healthier behavior, but for Russian elderly, the income effect is ambiguous: higher incomes may lead towards increased negative practices (bad habits, overeating).
8. The sample population surveys data point to persistence of gender inequality in domestic burden in Russia: in the male perception, domestic work takes more time than in the women perception. The responses depend on the stage of the family life cycle and the burden of the children. The analysis of the previous studies (primarily foreign ones), as well as interview transcripts, confirms the hypothesis that the internal conflict of the respondents due to the mismatch between the situation in the family and the social norms shared by them explains the declared scope of involvement in domestic work**.** In general, the responses about time for domestic work are often not the actual situation, but the respondents’ subjective perception of it. However, they deserve research attention, because perception influences the quality of life and decision-making.

**The degree of implementation, recommendations regarding implementation or the results of implementation of the research outcomes.** According to the results of the project 22 scientific publications, including 12 articles in WoS and Scopus journals, were prepared. Some results of the project (relating to the analysis of the redistribution effects of social and tax policies, and active ageing policies) have been used in the preparation of the 2017 analytical briefs and expert recommendations, including those, which were directed to the Government of the Russian Federation. The results of modelling the effect of changes in fiscal policy on the change in the income of Russian population in 2010-2017, estimation of the possible effects of the “tax maneuver” in 2017, estimation of the possible effects of informal employment formalization in Russia in 2017 have particular practical relevance in activities of the Ministry of Labor and Social Protection and the Ministry of Finance of Russia.

**The area of application.** The results of this project can be used by the Ministry of Labor and Social Protection of the Russian Federation, the Ministry of Finance of the Russian Federation, the Ministry of Economic Development of the Russian Federation, Ministry of Health of the Russian Federation, the Federal State Statistics Service (Rosstat), and other government agencies to improve the legislation in the area of social, tax and economic policies and to assess their effectiveness.