ANNOTATION
to the dissertation for the degree of Doctor of Philosophy (PhD) in the educational program in the specialty «6D090500 – Social Work»
by Aigerim Aidarbekkyzy Zhakypbek
on the topic «Activating Technologies for Overcoming Social Exclusion of Older People (a Case Study of Shymkent City)»

Relevance of the Dissertation Research. The process of population ageing in Kazakhstan is characterized as a structural transformation that exerts a comprehensive impact on the social structure, economic relations, and institutional system of society. Along with the growth in the number of older people, their age structure is becoming more complex: on the one hand, the proportion of older age groups (80+) is increasing, which intensifies the demand for care; on the other hand, a significant share of older people belongs to the category of the «young-old» with a high potential for social and economic activity. However, the incomplete realization of this potential indicates limited opportunities for their integration into society. The social position of older people is formed as a result of inequalities accumulated over the life course, whereby differences in education, income, health status, and social ties become particularly pronounced in old age. As a result, social exclusion emerges as a multi-level phenomenon encompassing health, economic, social, institutional, and digital dimensions.

The social exclusion of older people is further complicated by gender, territorial, and institutional factors. The predominance of women, especially in older age groups, increases the risks of loneliness, social isolation, and economic dependence. In urban and rural contexts, social exclusion manifests in different forms: in urban areas, a weakening of social ties is observed, whereas in rural areas, access to services is limited.

Regional disparities, unstable participation in the labor market, the compensatory nature of institutional support, and digital inequality further exacerbate the social vulnerability of older people. The combination of these factors determines the structural and dynamic nature of social exclusion and substantiates the need to revise social policy towards older people, as well as to develop resource-oriented activating technologies.

Purpose of the Dissertation Research: The purpose of the dissertation is to conduct a comprehensive theoretical and empirical analysis of the multidimensional nature of social exclusion among older people in Kazakhstan, particularly on the example of the city of Shymkent and the Turkestan region, as well as to substantiate an effective activating model of social work technologies aimed at its overcoming.

Research objectives:

1. To conduct a comprehensive analysis of the theoretical and methodological foundations of the concept of social exclusion of older people, to examine the evolution of its formation within the context of various scientific schools and approaches, and to systematize its content, conceptual boundaries, and key interpretative approaches in

contemporary scientific discourse. To specify and elaborate the content of such dimensions of social exclusion as health, economic, social, spatial, institutional, cultural, symbolic, and digital, as well as to provide a theoretical justification of the mechanisms of their interconnection, mutual reinforcement, and cumulative effects, and to determine their applied potential within the scope of the research topic;

2. To review social work technologies and models aimed at overcoming the social exclusion of older people, to present a typology of these technologies, to provide their conceptual justification, to conduct a comparative analysis of international models, and to develop a methodology for evaluating the effectiveness of social work technologies;

3. To conduct a comprehensive assessment of the socio-economic situation, quality of life, level of social participation, and accessibility of social resources of older people in Kazakhstan, including the case of the city of Shymkent and the Turkestan region, based on empirical data, as well as to identify regional specificities and assess the level of their social inclusion through the analysis of social participation, formal and informal social ties, access to social services, and the degree of integration into the digital space;

4. To develop a structural model of social exclusion of older people, to identify its key determinants, risk factors, vulnerable groups, and features of manifestation in different social contexts; to determine effective social policy instruments, institutional models, and practical interventions based on a comparative analysis of international and domestic experience in overcoming the social exclusion of older people;

5. To develop a comprehensive model of social work technologies aimed at enhancing the social inclusion of older people, with a scientific justification of its theoretical foundations, structural components, implementation mechanisms, and expected outcomes;

6. To identify mechanisms for overcoming the social exclusion of older people in Kazakhstan at the institutional, community, and applied levels, to reveal the logic of their interrelations, and to develop specific practical recommendations; to form a system of scientifically grounded proposals aimed at improving social policy, the system of social services, and modern models of working with older people, as well as to determine strategic directions for increasing their effectiveness.

Object of the study: the social situation of older people in contemporary Kazakhstani society, the level of their social activity, access to social resources, and the multidimensional nature of social exclusion formed within these processes.

Subject of the study: the mechanisms of formation of social exclusion of older people, its manifestations in the spheres of health, economic, social, spatial, institutional, cultural, symbolic, and digital dimensions, as well as the theoretical foundations, structure, and mechanisms for the practical implementation of social work technologies aimed at overcoming this phenomenon.

Research hypothesis is based on the assumption that social exclusion among older people is a multidimensional process shaped by accumulated social inequalities, institutional constraints, and a decline in social inclusion. It is assumed that the existing compensatory mechanisms of social support are insufficiently effective in overcoming social exclusion, as they are primarily focused on addressing the consequences rather than the underlying causes of social problems. It is expected that the implementation

of activating social work technologies based on resource-oriented, person-centered, and community-based approaches will contribute to the expansion of social networks, enhancement of social activity, strengthening of social capital, reduction of the level of social exclusion, and improvement of the quality of life of older people.

Research methods: to achieve the research aim and accomplish the objectives of the dissertation, a Mixed Methods Research design based on the integration of quantitative and qualitative methods was employed. The study applied general scientific methods, including analysis, synthesis, comparison, generalization, and modeling, as well as theoretical analysis of scientific literature, legal and regulatory documents, and international experience. Empirical methods included a quantitative survey of older people, biographical and expert interviews, case analysis of media materials from the Eldergram project, and document analysis. Quantitative data were processed using the SPSS software package, while their interpretation was conducted through the Bristol Social Exclusion Matrix (B-SEM) analytical framework. Qualitative data were analyzed using biographical and thematic analysis methods, enabling a comprehensive examination of the factors contributing to social exclusion among older people and the mechanisms for overcoming it.

The leading idea of the research is that overcoming social exclusion among older people should be based on a transition from the traditional compensatory model of social support to an activating model of social work aimed at developing individuals' internal resources, expanding social networks, strengthening social capital, and creating conditions for the active participation of older people in social life. Within this framework, older people are viewed not as passive recipients of social assistance but as active subjects of social relations who possess potential, life experience, and opportunities for self-realization and social integration.

The theoretical significance of the research is determined by the systematic reconceptualization of social exclusion among older people as a multidimensional and dynamic social phenomenon. The dissertation substantiates social exclusion as a complex system formed through the interaction of factors related to health status, material resources, social relationships, institutional accessibility, and digital accessibility. The concepts of the life-course perspective, cumulative disadvantage, social capital, and the capability approach are integrated, allowing for the development of a comprehensive theoretical model explaining the social vulnerability of older people. This substantiates the cumulative nature of inequalities in later life and expands scientific understanding of social exclusion as a dynamic process.

The practical significance of the research lies in the development of applied solutions aimed at enhancing the social inclusion of older people. As a result of the study, social work technologies were systematized, and mechanisms facilitating the expansion of social activity, strengthening of social networks, development of digital skills, and enhancement of the agency of older people were identified and refined. The models of the «Social Resource Center» and «Social Village» are proposed as an integrative support system for older people, and their potential for implementation at both institutional and community levels is substantiated. The research findings are intended for application in improving social policy, social service systems, educational processes, and practical work with older people.

The theoretical and methodological foundation of the study is based on the integration of contemporary theories and approaches that allow social exclusion of older people to be considered as a multidimensional, multi-level, and dynamic social phenomenon. Social exclusion is understood as a complex structure manifested in the restriction of older people's access to economic, social, institutional, cultural, and digital resources. The theoretical basis of the research is formed by the theory of social exclusion, the life-course concept, and the theory of cumulative disadvantage, which makes it possible to consider the current social position of older people as the result of life-long accumulated experience and inequalities. The theory of social capital and the capability approach serve as the basis for analyzing the social integration of older people through the quality of their social ties, their ability to use resources, and their level of autonomy. The concept of active ageing considers older people not as passive objects of social policy but as active subjects, substantiating the need to expand their participation in public life.

From a methodological perspective, the study relies on interdisciplinary, systemic, and integrative approaches, which allow for a comprehensive analysis of social exclusion at the micro-, meso-, and macro-levels. In the empirical part, the Bristol Social Exclusion Matrix (B-SEM) was used as the main analytical tool, enabling a systematic assessment of access to resources and the level of social activity of older people. The study was conducted based on a mixed methods strategy, combining quantitative survey data with qualitative methods (in-depth interviews, case analysis, content analysis). The application of methodological triangulation ensured increased reliability and validity of the results and made it possible to comprehensively interpret the social exclusion of older people at structural, relational, and subjective levels.

Scientific novelty of the dissertation research is determined by a comprehensive analysis of the social exclusion of older people in the context of Kazakhstan as a multidimensional, multi-level, and interconnected social phenomenon, as well as by the theoretical and applied substantiation of social work technologies aimed at its overcoming. In the study, social exclusion is considered not as a set of separate social problems but as a systemic process formed through the interaction of economic, social, institutional, spatial, cultural, and digital factors. The proposed integrative theoretical and methodological model, combining the life-course concept, the theory of cumulative disadvantage, the theory of social capital, and the capability approach, makes it possible to dynamically explain the mechanisms of the formation of social vulnerability in old age.

The social content of ageing has been reconsidered, and it has been demonstrated that it is determined not only by chronological age but also by the social environment, health status, and life experience. Empirical results revealed structural, gender, and spatial features of social exclusion among older people, showing that the weakening of social ties, limited access to services, and digital inequality act as key factors intensifying the process of social isolation. Biographical analysis substantiated the cumulative nature of social exclusion formed throughout the life course, while the analysis of media cases from the «Eldergram» project made it possible to identify new forms of activity among older people. The applied novelty of the research is associated

with the systematization of social work technologies aimed at increasing the social inclusion of older people, as well as with the development of the «Social Resource Center» and «Social Village» models.

Main provisions submitted for defense:

1. Social exclusion among older people is a multidimensional, dynamic, and structurally conditioned process formed under the influence of accumulated social inequalities and manifested in economic, social, institutional, spatial, and digital dimensions.

2. Social exclusion among older people results from the interaction of individual, social, and institutional factors accumulated throughout the life course, which necessitates its analysis at the micro-, meso-, and macro-levels.

3. The existing system of social support for older people in Kazakhstan is predominantly oriented toward a compensatory approach and does not sufficiently ensure the expansion of social activity, independence, and social inclusion of older people.

4. Effective overcoming of social exclusion among older people requires a transition from a compensatory model of social support to an activating model of social work based on resource-oriented, person-centered, and community-based approaches.

5. The developed integrative model of activating technologies, including the «Social Resource Center» and «Social Village» models, contributes to the expansion of social networks, strengthening of social capital, enhancement of social activity, and improvement of the level of social integration among older people.

Scope and Structure of the Dissertation. The structure of the dissertation is determined in accordance with the logic of the study arising from the stated aim and main objectives. The work consists of an introduction, 3 chapters, 9 sections, a conclusion, a list of references, and appendices.