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Organizational and economic foundations of activities to preserve health and  
provide social services to disabled elderly people in modern Russia

Abstract of the dissertation for the degree of Candidate of economic  
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The dissertation for the degree of candidate of economic sciences by S.S. Puzin was completed in the scientific specialty «5.2.3 - Regional and sectoral economics (economics of the service sector)» and is a complete independent study of the features, trends and prospects for transforming activities to preserve health and provide social services to disabled elderly people in modern Russia. The work presents a set of conclusions containing scientific novelty, making a certain contribution to the development of domestic economic science and practice, and also having significant potential for use in the educational process in the training, retraining and advanced training of managers and economists.

**The relevance of the research topic.** The current stage of the country's demographic development is characterized by population aging, which must be taken into account in the process of transforming the social sphere in general and specifically in terms of transforming activities in the field of health care and providing social services to older age groups of the population, including elderly people with disabilities. Elderly people with disabilities make up 2/3 of the total number of people with disabilities, their life expectancy and motivation for social activity are increasing, which is becoming possible due to modern achievements in medical science, pharmacology, gerontology and active state social policy.

The state focuses on solving the problems of disabled people, increases financial costs for such a solution. This determines modern trends in the transformation of activities for the organization and management of health care and social protection systems, aimed at preserving health, maintaining social activity, and a decent standard of living for elderly disabled people.

Medical care, medical and social services and various social services are of particular importance for maintaining health disabled elderly people. The currently implemented state programs aimed at transforming healthcare, the National Project «Demography» provide for measures to improve the quality of medical care, rehabilitation of disabled people, increase their accessibility to physical education and health activities, and strengthen their motivation for a healthy lifestyle. Also, which is very important for disabled elderly people, the provision of care services, home

care and palliative care is intensified.

Such health protection measures as geriatric-oriented sanatorium-resort treatment, physical culture and sports services, individual social and psychological support and accompaniment, training in self-identification of health status, recreational and health tourism for the elderly and disabled are in great demand among disabled elderly people and service providers (of various organizational and legal forms). In this case, as most experts in science and practice note, there are many costs associated with organizational and methodological omissions, insufficient education of consumers and service providers focused on the disabled, regarding their rights and their implementation in practice.

In modern conditions in Russia new socio-economic relations have been formed and continue to develop concerning different spheres of life, including the provision of medical and social services to different categories of the population. In practice, such services to elderly disabled people are mainly provided by medical institutions of the healthcare system and social services of the social service system at the local level, the effectiveness of which largely depends on regional and municipal authorities. Normative legal acts of specific subjects of the Russian Federation determine the specifics of the organization of social services and social services for elderly people with the status of veterans and disabled people. Elderly disabled people are not singled out as a separate category of consumers of medical and social assistance, as well as relevant services. To varying degrees, health disorders manifest themselves in each elderly disabled person and because of this, dysfunctions of systems and organs develop and, as a consequence, various manifestations of life activity limitations are developed, in which both disabling conditions and age-related conditions are synergistically reflected, which requires specific social support for these people. In 25% of cases, elderly disabled people have mental disorders and communication problems with the outside world. Many elderly disabled people are at risk of desocialization, disintegration, and physical barriers to independent living, movement, and social mobility arise. All this leads to emotional burnout and minimizes the physical and social mobility of such disabled people.

Due to the above circumstances, disabled elderly people have specific social problems, the solution of which, as a rule, is associated with the provision of special types of medical care and social services. The solution to these problems compensates for the limitations of life activity and allows a person to live for a long time in an open society, to be a fully or partially autonomous person, to lead an independent lifestyle. The tools for this solution are guaranteed and paid types of medical care and social services. Elderly people in general and, in particular, those with disabilities mainly become consumers of guaranteed state social services intended for health protection and social services. Paid services are inaccessible to most of these people due to low incomes. In Russia, modern socio-economic policy is aimed at improving the well-being of every citizen of the country. One of the key instruments of social support for disabled elderly people are old-age or disability pensions. The number of pensions is regularly increased and, perhaps, in the future, these people may become potential buyers of the social services they need. However, current negative circumstances (pandemic, sanctions, etc.) push this possibility into the indefinite future.

New approaches to the organization of health protection and social services for certain categories of the population, the transfer of prerogative powers to regional government bodies in this area, the increasing responsibility of citizens themselves for their health and well-being based on personal resources, necessitate studying changes in the organizational and economic foundations of activities to preserve health and provide social services to disabled elderly people, scientific substantiation of the mechanism for improving the organization of this activity, including at the interregional level, in modern Russia. Until now, this problem has not been comprehensively considered in scientific research in terms of integrating activities in the health care and social protection systems in relation to disabled elderly people.

All of the above determines the relevance of the topic of this study, its scientific and practical significance in terms of solving the social problems of elderly disabled people.

**The degree of development of the scientific problem.** Scientific works concerning the organization of medical care and services related to the protection of

health and medical and social services for the elderly and disabled people, cover guaranteed types of medical care and new medical methods in relation to various nosological forms of health disorders, as well as the study of the prospects for the use of certain forms of medical and social services, as a rule, either by categories of elderly people or by categories of disabled people.

A number of publications present the results of scientific research into the development of the service sector, which examine economic issues of social services for the elderly and the provision of social, including medical and social, services in the light of social protection of the population and its individual categories. Among such works, the following should be highlighted: Azoev G. A., Volgin N. A., S. V., Kadamtseva S. V., Kosenko O. Yu. A very important aspect of socio-economic relations in relation to the elderly is the prevalence of ageism, which is highlighted in their scientific publications by Klepikova E. A., Kolosnitsyna M. G., Sokolov I. V.

Many scientists note the need to streamline state regulation of activities at the regional level related to social support and social services for the elderly and disabled. Bobkov V.N., Roik V.D., Khrapilina L.P. point out that in order to increase the availability of social services for the elderly, it is necessary to use technologies of compulsory and voluntary medical and social insurance. In market conditions, as these scientists believe, such insurance becomes the socio-economic basis for providing guaranteed and additional social services in general and, in particular, medical and social services and high-quality medical care for older age groups of the population.

Suleimanova G. T., Kurmanova A. R., Kasiev N. K., Kasymova R. O. presented representative evidence that it is possible to prevent elderly people from becoming dependent on outside social assistance by creating favorable living conditions for them through planning the development of a social assistance system based on long-term forecasts of the medical and social needs of these people. A new area of research has become the digitalization of healthcare and social services. We note the scientific publications of Kormacheva O. S., Lysenko E. A.

In the research works of foreign authors who have studied the problems of

assistance to elderly disabled people, the features of the mechanisms for organizing this assistance in individual countries are highlighted (Rosales - Huamani J. A.; Castillo - Sequera J. L.; Paredes - Larroca F.; Landauro - Abanto A.; Zuloaga - Rotta L. A. Zhang R., Zhang Z., Peng Y., Belzunegui - Eraso A.; Pastor - Gosálbez I.; Puig - Andreu X.; Valls - Fonayet F., Cirella G. T., Bāk M., Kozlak A., Paw łowska B., Borkowski P.). K. Renker and W. Presber argue that the satisfaction of the social needs of older people, including the disabled, through medical care and medical and social services should be achieved through the development of geriatrics, the rehabilitation industry and rehabilitation technologies. O. Hook, H. Bringmann, J. Kostuik. MithrSg R. Gillespie, F. L. Ubers, Heftiet point out that the legal framework for health protection and medical and social services for older people has features that are specific to different countries, but in general the approaches embedded in them are similar.

Karnaukhova, V.K., Konoplev N.S. contributed to the study of this topic in the aspect of servitology, covered the organizational and economic aspects of providing social services to elderly people at the local level. Kondratieva E.A., Khrapilina L.P. on the basis of the conducted research revealed significant omissions in the coordination of the activities of the services of the health care and social protection systems of the population, authorized to implement medical and social services for the elderly, pointed out the peculiarities of the problems in this area, concerning elderly people with disabilities.

The results of the analysis of various sources of literature and numerous scientific publications touching upon the issues of active longevity, organization of medical care, medical and social services, allowed us to state that there is no comprehensive scientific research concerning the specifics of activities to preserve health and provide social services to disabled elderly people. Scientific works do not contain scientifically substantiated developments of the mechanism for organizing such activities and the need for them in modern Russia, taking into account new priorities in healthcare, changes in the economic foundations and content of social guarantees for the provision of medical care and social services, as well as the

availability of appropriate preferential and paid services to such disabled people.

**Object and subject of research.**

The object of the study is the system of organizational and economic support for health care and provision of social services to disabled elderly people in Russia.

The subject of the research is socio-economic relations arising in the process of transformation of activities health protection and provision of social services to disabled elderly people.

**Theoretical and methodological basis of the research** includes the works of scientists on the problems of economics of health care and social security, demography, organization of medical care and medical and social services, development of geriatrics, rehabilitation industry in relation to elderly people and disabled people.

The work uses the developments of domestic and foreign authors, which contain ideas and concepts devoted to the problems of the functioning and development of institutions for the protection of health and social services for the elderly and disabled, the transformation of special social services and the forms of their provision to these categories of the population.

The following methods were used in the study: bibliographic, socio-economic, comparative and logical analysis, generalization, statistics, expert assessments, modeling, sociological research (questionnaires, expert survey, observations).

**The research information base** includes legislative federal and regional acts, WHO publications, Roskomstat data, materials of the Ministry of Health of the Russian Federation, the Ministry of Labor and Social Protection of the Population of the Russian Federation, the Ministry of Industry and Trade of the Russian Federation, the Pension, Medical and Social Insurance Funds of the Russian Federation, federal and regional regulations and other documents governing individual areas of activity in the field of health care and social services. Also used were reports of regional and municipal structures, the results of research conducted by the author of this work, price lists of various organizations providing various social services related to the topic of this study.

**The validity and reliability of the research results** are determined by the logically structured methodology of the research work, a large volume of thematic material and the results of its analytical study, the use of current multi-level acts of the Russian Federation regulating the studied area of activity, provisions taken from scientific works of foreign and domestic authors, confirmed by relevant references, as well as the author's own representative data obtained during the research.

**The provisions submitted for defense and having scientific novelty,** obtained personally by the author as a result of this research:

1. The need for proactive activities of the state and society to address the problems caused by the processes of population aging and, associated with this, the increase in the number of elderly people with disabilities is substantiated. These processes have a significant impact in Russia on socio-economic development, changes in the social sphere, primarily regarding health care and social support for the population and its individual categories. The stated position differs from modern views on the priorities of situational life circumstances, according to which activities are carried out to implement state guarantees of medical care and social services according to the categorical belonging to «disabled people» or «elderly persons», without taking into account the specifics of elderly people with disabilities and, in this context, without identifying the category of «elderly people with disabilities». The growing need for transformations of the organizational and economic foundations of activities to save health and provision of social services to disabled elderly people with a focus on the rational use of public resources allocated for these purposes in the health care and social protection systems. The study established that industry approaches are used in practice within the framework of the implementation of relevant industry tasks. It is argued that strengthening interdepartmental interaction will lead to achieving a positive synergistic effect of activities, including in terms of resource use. (passport of scientific specialty 5.2.3. – «Regional and industry economics» (economics of the service sector): 4.1. Theoretical and methodological foundations for analyzing the problems of service sector development, 4.16. Policy for regulating and supporting the development of service sectors).



2. A concept for transforming the management of activities to preserve health and motivate social activity of elderly disabled people based on protecting their health and providing social services through the technology of integrated social and medical services has been developed. In contrast to modern sectoral situational approaches, the main provisions of the concept are as follows:

- it is proposed to consider the system of management of health protection activities and provision of integrated social and medical services disabled elderly people, as a complex of organizational and managerial, normative and legal, financial and economic interconnected regulators, on the basis of which the organization of the provision of personalized types of medical care and social services to these persons is carried out, and a resource base is formed that ensures the functioning of medical and social services that, within the framework of their powers, perform the socially significant function of extending active longevity and creating socially acceptable living conditions for disabled elderly people. This system will allow achieving a positive saving effect health and long-term social activity of elderly disabled people;

- the concept of «integrated social and medical services» has been introduced into scientific circulation, which refers to a set of interdependent social and medical services related to medical and social assistance within the framework of interdepartmental interaction of authorized health care and social protection services. (passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.1. Theoretical and methodological foundations for analyzing problems of development of service industries, 4.12. Health care economics, 4.16. Policy for regulating and supporting development of service industries).

3. It is substantiated that for regions and individual municipalities with a high population density and isolated and hard-to-reach settlements, a centralized type of organization of medical care and provision of social services to elderly disabled persons should be used in terms of providing them with specialized qualified services and maintenance. For this purpose, it is preferable to carry out a planned consolidation of the relevant facilities and services, with a focus on the creation of geriatric medical care centers and comprehensive medical and social services to the elderly in general

and to elderly disabled persons in particular. For regions and municipalities with a low population density, large distances between settlements, and the presence of isolated and hard-to-reach settlements, a decentralized type of organization of medical care and provision of social services is advisable through the development of a network of specialized institutions, organizations, offices, mobile complexes (medical, social services, recreational and health, physical education and health, sanatorium and resort, etc.). This position differs significantly from the practice of activities based on the normative methodology of the unified definition of the type of objects on the ground and the type of their activities. (passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.1. Theoretical and methodological foundations of the analysis of problems of development of service industries, 4.12. Health care economics, 4.16. Policy for regulation and support of development of service industries).

4. The necessity of introducing amendments to federal and regional legislation has been proven. These amendments should concern the establishment of specific powers of regional and municipal authorities in the area of organizing and providing resources for the development of health protection activities and the provision of diverse guaranteed social services to elderly people in general and, in particular, to disabled people of this age, as well as streamlining and monitoring the provision of integrated social and medical services within the framework of guaranteed medical care and medical and social services, social services with and without accommodation in specialized institutions, resolving issues of proper maintenance and provision of infrastructure facilities, increasing the motivation of the personnel of specialized institutions for effective work. (passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.12. Economics of health care, 4.16. Policy for regulation and support of development of service industries).

5. The results of the study of the existing organization of medical care and various types of social services based on the provision of paid services to elderly people in general and to disabled elderly people in particular are formulated and substantiated. It is proven that in modern Russia, entrepreneurship related to special

services for these categories of the population in the specified areas of activity is poorly developed due to the fact that paid services are usually expensive and are focused on a small group of elderly people with a high level of their own wealth or the wealth of their families. Most disabled elderly people belong to the poor strata of the population and cannot afford paid services. To develop this area of activity, it is necessary that services intended for health protection and the provision of social services, including integrated social and medical services, to disabled elderly people, are provided both in the social sectors and by motivating entrepreneurs using economic levers (in relation to the topic under consideration - equal participation in competitions, tenders, municipal and state orders, target programs, etc.). The state and the business community, through charity, could undertake full or partial monetary compensation to disabled elderly people for their proactive purchase of certain goods and services that are not included in the guaranteed ones, but are necessary. It is especially important that the private sector be interested in the provision of integrated social and medical services. (passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.12. Healthcare economics, 4.16. Policy for regulation and support of development of service industries).

6. A draft model of the mechanism for providing integrated social and medical services to disabled elderly people (ISMS) has been developed. This mechanism, in contrast to the existing mechanism based on a single-industry approach, is targeted at the needs of such people to meet their needs for these services by coordinating efforts and their organizational and economic support with resources of the healthcare system and the social protection system. It is substantiated that in some cases it will be necessary to integrate these services with other services (legal, notary, volunteer, etc.). In order to coordinate activities to provide ISMU to disabled elderly people, the need to create a special interdepartmental support service for elderly people with disabilities (SPPI) is substantiated, which could function on the basis of social protection authorities or MFCs authorized by regional authorities. The SPPI proposes to use the information and communication aggregator and the medical and social aggregator developed by the author as effective innovative tools for providing integrated social

and medical services to disabled elderly people. For financial support of the ISMU, such instruments as individual financial certificates, social contract, life annuity with dependency (with the inclusion of the ISMU in the list of services within this annuity) have been proposed. (passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.16. Policy for regulation and support of development of service sectors).

**The theoretical and practical significance of the study** lies in the development of conceptual provisions on the need to strengthen the integration of activities to protect the health and social services of disabled elderly people. by way development of integrated social and medical services for them based on:

- effective interaction between the healthcare and social protection systems of the population, as well as other entities involved in the provision of social services to these persons who are authorized to carry out this activity;

- monitoring the needs of elderly disabled people in types and forms of medical care and services, various social services and, based on the results of such monitoring, planning measures to meet them.

The practical significance of the work lies in the fact that the developed provisions and conclusions can be used to improve the organizational and economic foundations of activities to protect health and provide social services to disabled elderly people. The introduction into practice of the proposed new type of services - integrated social and medical services, will allow on their basis to modernize medical and social services for such categories of disabled people. The proposals set out in the dissertation will be useful for managing the development of the geriatric profile of services and medical and social protection of disabled elderly people, as well as elderly people in general. They can be applied in the practical activities of federal and regional government bodies, local government bodies, healthcare institutions and organizations, social protection of the population, insurance organizations, and other structures involved in solving the above problems. The dissertation materials can be used in academic work and have already become the starting point for scientific research in this area.

### **Testing the research results.**

The research results were presented in the report «Economic and legal aspects of improving medical, social and medical care for elderly and elderly citizens» at the international conference session «Public administration and development of Russia: global trends and national prospects» (Moscow, 2022), as well as in the report «Comprehensive medical and social care and services for the elderly in inpatient settings» at the international conference session «Public Administration and Development of Russia: Civilizational Challenges and National Interests» (Moscow, 2023).

The main conclusions and provisions of the dissertation research are presented in 13 scientific publications of the author, including in scientific journals Scopus:

1. Puzin S. S. Ensuring the protection of the rights of persons with disabilities to access medicines / Puzin S. N., Grechko A. V., Pryanikov I. V., Malichenko V. S., Puzin S. S. // J. Scopus Advances in Gerontology. 2018. - Vol. 31. - № 4. - P. 581–587.

2. Puzin SS Protection of the rights of disabled people to access medicines" / Puzin SN, Grechko AV, Prianikov IV, Malichenko VS, Puzin SS // Zh . Scopus Advances in Gerontology. 2019. - T. 9. - № 1. – P. 56–61.

- in scientific journals recommended by the **Higher Attestation Commission of the Russian Federation:**

3. Puzin S. S. Comprehensive assessment of the quality of life of people with disabilities due to coronary heart disease / Puzin S. N., Chandirli S. A., Gulua I. G., Agaeva L. M., Kuprin A. S., Govorushkina N. S. // Bulletin of the All-Russian Society of Specialists in Medical and Social Expertise, Rehabilitation and Rehabilitation Industry, 2017. -№ (3). - P. 26-36.

4. Puzin S. S. The state of the problem of medical and social rehabilitation and habilitation of disabled people in modern Russia / Puzin S. N., Shurgaya M. A., Memetov S. S., Achkasov, E. E. Pogosyan, G. E. Lyalina, I. V., Omarov S. A., Gigineishvili D. N. // Medical and social examination and rehabilitation. 2018. - № 21 (1–2). - P. 10–17.

5. Puzin S. S. Ways to improve medical and social expertise at the present stage (review of regulatory documents) / Puzin S. N., Memetov S. S., Sereda A. N., Petrova V. N., Sharikadze D. T., Kim V. V., Puzin S. S. // Bulletin of the All-Russian Society of Specialists in Medical and Social Expertise, Rehabilitation and Rehabilitation Industry. 2021. - № 3. - P. 7–15.

6. Puzin S. S. Analysis of statistical data on primary disability - the basis for planning measures for its prevention / Khorkova O. V., Puzin, S. N. Bogova, O. T., Puzin S. S. // Medical alphabet. 2021. № 23. - P. 100-103.

7. Puzin S. S. Medical and social assistance to elderly and old citizens (literature review) / Inderbiev T.S., Shaduri V.R., Mammadova M.N.K., Yarotskaya I.A., Potapov V.N., Bogova O.T., Puzin S.S. // Bulletin of the All-Russian Society of Specialists in Medical and Social Expertise, Rehabilitation and Rehabilitation Industry. 2021. - № 4. - P. 79-93.

8. Puzin S. S. Medical and social assistance and medical and social rehabilitation of patients of older age groups, including disabled people, with hypomobility syndrome / Aliev A.K., Puzin S.N., Vladimirova O.N., Goryainova M.V., Puzin S.S. // Bulletin of the All-Russian Society of Specialists in Medical and Social Expertise, Rehabilitation and Rehabilitation Industry. 2023. - № 1. - P. 7-16.

9. Puzin S. S. New approaches to organizing activities for the provision of social and medical services to disabled elderly people at the regional level / Puzin S. S., Khrapilina L. P. // Social and labor research. 2024. - № 3 (56). - P. 143-155.

**- in other scientific publications:**

10. Puzin S. S. Trends in the development of the rehabilitation industry for the disabled in modern Russia / Puzin S. N., Agaeva L. M., Govorushkina N. S., Puzin S. S. // Bulletin of the All-Russian Society of Specialists in Medical and Social Expertise, Rehabilitation and Rehabilitation Industry. 2021. - № 1. - P. 31-41.

11. Puzin S. S. Economic and legal aspects of improving medical, social and medical care for elderly and old citizens / S.S. Puzin // Collective monograph «Lessons of the COVID-19 pandemic for health care and society». 2022. - P. 262-279.

12. Puzin S. S. Comprehensive medical and social care and services for the elderly in inpatient settings /Khrapilina L.P., Puzin S.S., Shokova N.V., Gadzieva I.V.// Collective monograph «Innovation and technological sovereignty in healthcare in Russia». 2023. - P. 259-281.

The results of the dissertation work were used in the development of analytical notes and proposals for the preparation of amendments to federal and regional legislation, in the course of implementing targeted scientific and practical research. They are also used in the educational process of the Russian Presidential Academy of National Economy and Public Administration in the direction of «State and Municipal Administration», including included in the textbook. The author conducts educational practical classes for masters on the topic of «Organization of the provision of medical care and social services to the disabled», using the materials of the dissertation research and his own author's project.

**Conformity of the dissertation to the passport of the scientific specialty.**

The purpose, objectives, content and results of the study correspond to the following areas of the passport of scientific specialty 5.2.3. – «Regional and sectoral economics» (economics of the service sector): 4.1. Theoretical and methodological foundations of the analysis of problems of development of service industries, 4.12. Health care economics, 4.16. Policy for regulation and support of development of service industries.

**The structure and volume of the dissertation.** The dissertation is presented in 3 chapters on 147 pages, illustrated with tables and graphs, contains references to 134 domestic and foreign sources.