



Ministry of Labour and Social Policy

Project VS/2014/0026 “Development of National comprehensive strategy for active ageing”

National Comprehensive Strategy for Active Ageing in Bulgaria 2016 - 2030

The views expressed in the text are those of the authors and do not necessarily reflect the position of the European Commission and of the Ministry of Labour and Social Policy



The project is implemented with financial support from the European Union



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ISBN 978-954-92441-7-5



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LIST OF ABBREVIATIONS AND ACRONYMS

Abbreviation/Acronym	Full name
NPP	Nuclear Power Plant
EA	Employment Agency
SAA	Social Assistance Agency
BAS	Bulgarian Academy of Science
GDP	Gross Domestic Product
BDS	Bulgarian State Standard
GEA	Global Employment Agenda
ET 2020	Education and Training 2020
EUROSTAT	Statistical office of the European Union
EC	European Commission
EU	European Union
NCCCA	National Community Cultural Centres Act
VETA	Vocational Education and Training Act
ICT	Information and Communication Technology
IP	Investment Priority
CITUB	Confederation of Independent Trade Unions in Bulgaria
KRIB	Confederation of Employers and Industrialists in Bulgaria
SIC	Social Insurance Code
LC	Labour Code
MI	Ministry of Interior





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MFA	Ministry of Foreign Affairs
MH	Ministry of Health
LAG	Local Action Group
YICC	Youth Information and Counselling Centres
MC	Ministry of Culture
MYS	Ministry of Youth and Sports
MES	Ministry of Education and Science
MW	Minimum Wage
CM	Council of Ministers
ISCED	International Standard Classification of Education
MLSP	Ministry of Labour and Social Policy
MF	Ministry of Finance
NAVET	National Agency for Vocational Education and Training
NWCAC	National Work Capability Assessment Commission
NHIF	National Health Insurance Fund
EPAL NSS	National Support Service of the Electronic Platform for Adult Learning in Europe
NHS 2020	National Health Strategy 2020
R&D	Research and Development
NQF	National Qualifications Framework
NDP BG 2020	National Development Programme:





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	Bulgaria 2020
NAMRB	National Association of Municipalities in the Republic of Bulgaria
NCPHA	National Centre of Public Health and Analyses
OMC	Open Method of Coordination
UN	United Nations Organisation
OPSESG	Operational Programme “Science and Education for Smart Growth”
HRD OP	Human Resources Development Operational Programme
MD	Ministerial Decree
PA	Priority Axis
RB	Republic of Bulgaria
RHI	Regional Health Inspectorates
RHIF	Regional Health Insurance Funds
NWR	Northwest Region
WCAC	Work Capability Assessment Commission
LLL	Lifelong Learning
ESAC	Employment and Social Assistance Centre
PSC	Population Survey Centre
HRDC	Human Resources Development Centre
PSI	Public Social Insurance





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1. SUMMARY OF THE ANALYSIS OF SPECIFIC NATIONAL AND REGIONAL CHALLENGES AND OPPORTUNITIES FOR PROMOTING ACTIVE AGEING

Methodology and information sources

This Analysis presents the specific national challenges to and opportunities for promoting active ageing in different social life domains. It has been prepared for the purposes of developing a National Comprehensive Strategy for Active Ageing.

The Analysis is based on indicators which reflect the three active ageing pillars from EU’s “Guiding Principles for Active Ageing and Solidarity between Generations”. It makes use of the Active Ageing Index (AAI) and the data available from public sources, statistical indicators, etc. The Analysis outlines the opportunities to mobilise the potential of elder people, the factors affecting their social and economic activity and the specific possibilities for promoting active ageing in Bulgaria. The specific necessities and needs of elder people have been identified within the Analysis. The capabilities and potentials of the individual stakeholders can be thus outlined in a more distinctive way with a view to their more adequate participation and cooperation in the promotion of active ageing.

The different parts of the Analysis and the indicators used in the Index have been supplemented by other systematic information and existing quantitative data. Reliable information sources have been used for the purpose: Eurostat, NSI and other public surveys used in the Active Ageing Index, which respect a stringent methodology and ensure representativeness; European Company Survey (ECS) 2013, European Quality of Life Survey (EQLS) 2011/2012, European Working Conditions Survey (EWCS) 2010, European Social Survey 2012 which outline the lifestyle and specifics of elder people, their needs and the possibilities for support; the survey “Health at the workplace” 2010-2011, commissioned by the General Labour Inspectorate, which outlines the working conditions; special Eurobarometers, etc.

Further to the secondary analysis of the existing data and information, additional qualitative information from expert interviews has been used for the purposes of the Analysis.

Defining the term “active ageing”

The term “active ageing” can be defined in different ways, depending on whether the economic, social or health aspect of the phenomenon is considered.

International organisations give different but complementary focus to the term **active ageing**. According to their definitions, the term has three interrelated aspects:





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- **The Organisation for Economic Cooperation and Development** in Europe emphasises the **economic aspect** of the term, associating it with the ability of elder people to have real social and economic role in society. The ability to make a flexible choice of a lifestyle in old age – through participation in trainings, employment, doing different voluntary activities and providing care, is brought to the front.
- **The European Commission** formulated the parameters of „active ageing” in its 1999 Communication “Towards a Europe for All Ages”, under which the term means that we should adjust to the fact that we live longer and in better health than ever before and we should use that as an opportunity. In practice this means **adopting a healthy lifestyle, retiring later, and remaining active after retirement**. Promoting active ageing thus implies providing opportunities for better life, not limiting the rights to personal fulfilment and life choices. Prominence is given to the adequate income of elder people.
- The third aspect of the definition of “active ageing” is developed by the **World Health Organisation** and refers to **all-in participation of elder people in social, economic, cultural, spiritual and civic affairs**, not just the ability to be physically active or to participate in the labour force.

Demographic trends and lifestyle of elder people in Bulgaria

As a rapidly ageing country, Bulgaria faces a number of challenges, including challenges to economic growth, problems in the social systems and services, increasing public costs for pensions, healthcare, social assistance, education, housing infrastructure, etc.

The ageing population trend is also clearly illustrated by census data. In 2011, the proportion of people aged over 60 years was for the first time higher than that of people aged under 19 years. The 2001 census showed equal proportions of the above two groups and only ten years later the difference between them was already 8 percentage points. What is more, over a period of 65 years, between 1946 and 2011, the proportion of young people had almost halved – from 38% in 1946 to 18% according to the latest 2011 census.

NSI projections show that by 2070 elder people in Bulgaria will make up almost two-fifths of the population.

According to the UN estimates, in 2050 Bulgaria will be among the most ageing countries in Europe with 301 people aged over 60 for every 100 people aged 0 – 14, which means that the elder population in Bulgaria will be about three times the number of the youngest population.

The population ageing trends in Bulgaria are illustrated best by the UN **demographic replacement** indicator measuring the ratio between the number of population aged 15 to 19



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years (persons entering working age) and the number of population aged 60 to 64 years (persons exiting working age), calculated in percentage. This is also an indicator of the reproduction of the working-age population. At 31.12.2014, the ratio was 62. By comparison, in 2001 every 100 persons going out of working age were replaced by 124 young people.

Population ageing and the declining birth rate point to a decreasing demographic replacement rate (the number of the population aged 15 to 19 years – persons entering working age, is smaller than the number of the population aged 60 to 64 years – persons exiting working age). This reversal occurred in 2007. Before that, the demographic replacement rate registered values higher than 100 in the cities, but after 2008 the values in the cities also fall below 100.

In 1990, the relative share of the population under working age was 21.6%, in working age - 55.5%, and above working age - 22.9%. In the following years the share of the youngest population decreased to 14.8 % or 1 065 thousand people in 2014. The working-age population registered relative increase to 61.1 % (4 403 thousand people), but that was the result of legislative changes to the method of determining the retirement age thresholds¹. In 2014, the relative proportion of the working-age population was 24.1 %, or 1 734 thousand people.

The above trends place the focus on the issues of elder people's access to health care and services and the respect of their rights as patients. That is emerging as one of the major challenges to the health system and the system of public services.

A number of factors determine the specifics of the lifestyle of elder people in Bulgaria. Existing Eurobarometer and Eurostat data outline the following general picture:

- **Low share of elder people doing physical exercise and sport:** In Bulgaria, elder people participate very little in different forms of physical activity, physical exercise or sports – 1,9% against 10,7% EU average (source: Eurobarometer surveys conducted in 2010 and 2013: Special Eurobarometer 334 and Special Eurobarometer 412, Sport and Physical Activity). Physical exercise is very important for preventing overweight and thus for lowering the risk of many diseases such as those of the cardio-vascular system, diabetes and some oncological pathologies.
- **Worse health status and bad mental health indicators compared to the other EU Member States:** Many of the indicators of the health status of elder people in Bulgaria also paint an alarming picture – Bulgarians in good mental health aged 55+

¹ In 2014, the working-age population included men aged between 16 and 63 completed years and women between 16 and 60 years and 8 months completed. In 1990, the age limits were respectively 60 years for men and 55 years for women.





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make up 52,6%, whereas the EU average is 63,9%; precautionary examinations and tests among Bulgarians, including the elder population, are essentially less common compared to the other EU Member States. (Source: Health determinants, 2009, Special Eurobarometer 329). At present, more than half of the elder people in Europe are overweight or obese. Those indicators are even more alarming in Bulgaria. That creates risks of cardio-vascular diseases, diabetes and certain types of cancer, has a significant impact on the quality of life, affects the sustainability of the health system and affects the viability of the economy.

- **Little participation in voluntary activities:** Elder people in Bulgaria participate very little in different forms of voluntary activities (3% against 15% EU average). Bulgaria ranks last on this indicator.
- **Lower political participation:** The political participation of elder people in Bulgaria is also lower than the EU average - 8,3% against 12,1% EU average.
- **Participation in cultural life and going to cultural events:** The results of the 2013 Eurobarometer (Special Eurobarometer 399, Cultural access and participation) are another example of the low level of activity of the people aged 59+ in Bulgaria. The survey shows that elder people participate less than the other social groups in different forms of social life: going to the theatre, to a film, to other cultural events. In Bulgaria that is due to a large extent to the lack of funds despite the existing interest and free time.
- **Low level of outdoor activities:** The data from the same survey show that elder people in Bulgaria spend more time in front of the TV and participation in outdoor activities, cultural activities, trips, etc. is less common.
- **Twice lower percentage of elder people using ICT:** The access of elder people to information and communication technologies is lower compared to the other population groups and much lower compared to the other EU Member States EU (18% against 38% EU average). The access to information and communication technologies is also important because they enable citizens who do not have medical knowledge to obtain basic information about their own health and physical condition. Problems could thus be detected faster, people could realise better their roles and responsibilities and make domestic measurements – of pulse, blood pressure, etc., necessary for the treatment and the therapy. Care would be thus shifted from the hospital to the patient at home and that is of major importance for the quality of life of elder people. The purpose, which is also what the European Commission aims for, is to help elder people to lead independent, healthy and active life as long as possible, while continuing to enjoy the comfort of their homes. That is



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possible thanks to technologies. There is direct link between the economic development of the region and the contribution to social issues such as healthy ageing and participation, thus encouraging also better participation and involvement of citizens.

Despite the highly urbanised population, **about one-third of the people aged 60+ live in the villages**. They make up 34% of the rural population. Notable is the upward trend in the proportion of elder people in the villages, unlike 65 years ago when the proportion of young people in the villages was higher compared to the cities. This also determines the wider territorial spread of elder people which is one more challenge in respect of the access to social services and the organisation thereof.

Active Ageing Index (AAI)

The Active Ageing Index (AAI) score for individual countries shows the extent to which the potential of elder people is used and the extent to which elder people are enabled and encouraged to participate in the economy and society. The theoretical maximum for AAI is 100 points. It is an “idealistic” score which in practice could not be reached as it implies a much higher life expectancy and much higher active participation of all elder people in the labour market and society than it is currently realistic.

The Active Ageing Index (AAI) is constructed on the basis of four distinct domains: **1: Employment; 2: Participation in society; 3: Independent, healthy and secure living; 4: Capacity and enabling environment for active ageing.**

Comparative results with a focus on Bulgaria - at EU level

Active Ageing Index in the Employment domain

EU average: 27,8 / BG: 25,1

With a value of 25,1, Bulgaria ranks close to the EU average in the Employment domain. Bulgaria’s strengths compared to many other EU Member States lie in the relatively high employment rate of women. At the same time, the country lags behind on employment in the higher age groups (60+). Unlike the top performers where employment in the 60-64 age group is above 50%, the value for Bulgaria in this age group is 39% for men and 20% for women. At the same time, employment in the 65-69 and 70+ groups in Bulgaria remains low (less than 5%), whereas the EU 28 leaders score around 24% and 11% on this indicator.²

Active Ageing Index in the Participation in society domain

EU average: 17,7 / BG: 12,5

² The data used are from the 2012 NSI Labour Force Survey





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Bulgaria scores low in the Civic Participation domain. The country ranks second to last on this indicator. It should be noted that low participation in society is typical not only for the elder people in Bulgaria but also for the other age groups and, in this sense, we do not speak of an age-determined problem. The low index values for participation in society are the result of underdeveloped volunteering and low political participation of elder people. Despite the poor ranking of Bulgaria, it should be taken into account that total 12 countries score below the EU 28 average. This means that the participation of elder people in society needs to be encouraged by creating more opportunities for volunteering and civil participation and community cultural centres and NGOs in Bulgaria would have a fundamental role in this respect.

Active Ageing Index in the Independent, healthy and secure living domain

EU average: 70,6 / BG: 62,7

Bulgaria scores low also in the independent living domain of the Active Ageing Index and has one of the lowest rankings. The country registers significant deficits concerning physical exercise and material deprivation, as a result of the high poverty levels. It scores low also on physical safety and risk of crime against elder people and their property. Bulgaria also registers lower than the EU average values on the other Index indicators – health status, meeting the needs of health and dental care, capacity for independent living, participation in different forms of lifelong learning. Reasons lie mostly in the long-term diseases and the poor health status of the population which, as people get older, aggravate to a higher extent compared to the majority of the other Member States.

Active Ageing Index in the Capacity and enabling environment for active ageing domain

EU average: 54,1 / BG: 52,2

According to the Index values in the Capacity and enabling environment for active ageing domain, Bulgaria is in the 17 place. The country's strengths include relatively high and gradually increasing level of educational attainment of elder people (higher educational attainment in formal education), good social connectedness and possibilities for contact and communication, as well as good healthy living perspectives. At the same time, Bulgaria is far behind on proportion of elder people using ICT, mental health and life expectancy.

Active Ageing Index – averages

EU average: 33,9 / BG: 29,9

The Index clearly highlights the domains where Bulgaria lags behind and which should be targeted by special measures for enhancing the capacity and opportunities for participation and improvement of the life of elder people:



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- Employment in the higher age groups (60+)
- Volunteering
- Participation in political life
- Use of ICT
- Addressing poverty and improving the housing conditions of elder people
- Improving the health status and mental health
- Improving the personal physical safety of elder people

Results for Bulgaria by regions

Employment

Applied at the regional level, the Active Ageing Index shows that there exist notable disparities in employment between the regions and areas. Lower scores are registered in Northern Bulgaria and higher scores are reported in Southern Bulgaria, particularly in the Southwest Region. Beyond those regional disparities, there is very strong disproportion between employment in major urban centres and the other localities. Particularly affected and vulnerable are the small towns and villages in the underdeveloped regions. They need to be targeted by special measures and interventions with a view to increasing employment of elder people.

Capacity for active ageing

The Active Ageing Index at the regional level shows relatively similar scores on capacity for active ageing. Reasons are that the indicators included in this domain are not influenced by the regional disparities and have comparatively similar values in all regions of the country. Higher capacity is available in the Southwest Region which is partly the result of the region's economic development and the better educational, health and material status and higher ICT uptake of elder people.

Regional profiles show that large disproportions exist not so much between regions but between the different settlements along the centre – periphery axis of the regions. In the cities, the situation is notably better while in the small towns and the villages the general material and social status is significantly lower. This calls for local measures to address the strong disproportions existing between the settlements within a region. For example, the Southwest Region registers very high total scores on the particular indicators (due mainly to the fact that it includes the capital city) but towns and villages at a huge disadvantage are to be found in some of the underdeveloped areas within the region.



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1.1. Specific national and regional challenges and opportunities for promoting active ageing in the employment domain

Employment rate

Along with the overall increase in employment, a number of policies applied in Bulgaria to extend the working life of elder people have had an impact and the share of employed persons in the upper age groups is increasing. The employment rate of people aged 55-59 and 60-64 increases notably in 2014 against 2003. Such a trend is particularly visible for women where employment doubles in the first group and increases almost four times in the second group. In the context of deteriorating demographic situation the employment of elder people represents a great reserve of labour force with high educational attainment and qualification and with valuable experience gained over the years.

In 2003, the six Bulgarian regions have similar scores on this indicator. The Southwest Region is an exception, with slightly more favourable scores in that period. Eleven years later, the rates of progress and the disparities between the regions increase. The employment rate of elder people in the Northwest Region and the North Central Region is lower than in the other four regions.³

The analyses show that elder people are unemployed for longer periods and it is more difficult for them to make the transition from unemployment to employment; in many cases the proportion of long-term unemployed elder people is higher compared to the other age groups. The elder unemployed often make a transition from unemployment to inactivity and waiting for retirement age. They are also less mobile and prefer not to change their residence for the purpose of work. Home ownership is also a factor for such a decision; they stay longer in the same job, it is more difficult for them to accept a new job and to change their job.

The situation of women and elder people with low educational attainment is less favourable compared to men and people with higher educational attainment. The developed lifelong learning system in a country creates preconditions for longer working life of the elder generations and vice versa. The absence of a well-functioning adult learning system in Bulgaria, tailored to labour market needs, is a significant deficit in this respect and does not create preconditions for quick adjustment and requalification of elder people according to labour demand. Some of the individuals in all groups want to continue working after retirement and they do so for various reasons – low pensions (but prolonging working life for reasons of economic necessity is not the optimal model), to have social contacts, to maintain

³ To calculate the differences between the regions is used the sum of the squares of the differences between the values of each region and the average for the country for each of the reference years.





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their skills and tonus, to participate in society (including through volunteering). It is important for those groups to be able to work less hours and under more flexible working arrangements. A portion of those who have acquired the right to a pension would also like to work but do not do so because of the shortage of vacant jobs, poor health, providing care for dependent family members, as well as other reasons. Lifestyle traditions and the shortage of kindergartens determine the high rate of irregular employment of elder people in raising their grandchildren and caring for other small children, which in turn has a favourable effect on the employment of children’s parents, but also on old people’s sense of social relatedness and social usefulness. It has to be noted, however, that despite the lower employment rate of the higher age groups, they are not characterised by the highest unemployment rates (the young people are more vulnerable).

During the whole period of statistical observation 2003-2014, the unemployment rate of the population aged 55+ is lower or close to the total unemployment rate. That is due to the fact that this age group (55+), as defined, covers many citizens who benefit from different measures of the Active Labour Market Policy targeted at people in pre-retirement age.

The difference between the women and the men aged 55+ in terms of the unemployment rate is small, with alternating periods of male unemployment prevalence and female unemployment prevalence.

The unemployment rate outlines a slight decrease in the unemployment of people elder than 55 years, although some of the regions, mainly those with high unemployment rates and weak economic development register the opposite trend (Northwest Region).

The employment and unemployment of people aged 50+ is influenced by the general labour market processes, but there are also specific factors for this group which determine the need to regard it as special in terms of the policies and initiatives for their active labour market participation. The factors preventing active ageing⁴ include decreased job performance as a result of poor health or health not cared for in the perspective of long working life, possession of knowledge and skills not in demand in the light of modern labour requirements of employers, obsolete or inadequate qualification, competition from age groups with better performance and advanced knowledge and skills, stereotypes in personnel selection, workplaces not adapted to elder people, unhealthy working conditions, unadaptable labour legislation, low productivity of labour and obsolete technologies, low

⁴ The term “active ageing”, which means healthy living, longer participation in the labour market, later retirement and remaining active after retirement, is clarified in EC’s 1999 Communication “Towards a Europe for All Ages”.





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income. Low labour market participation, poor involvement in lifelong learning, low self-esteem, etc. could be added to the above factors.

Raising employment and curbing unemployment of elder people is also important for increasing labour force supply in the context of increasingly smaller inflow as a result of the decreasing and ageing population. Another contributor is labour migration and the deteriorating labour quality as a result of the exit of highly qualified specialists and the entry of poorly qualified labour force with low educational attainment in the labour market. These problems also have specific regionalisation and they deepen in specific regions of the country. Labour force supply in the higher age groups also depends on the changes in the pension system and the increase of retirement age.

The main reason for elder people in Bulgaria not to work is that they reach retirement age and receive regular income in the form of pension. In the countries with higher standards and developed pension systems the reasons are different – the pension amount is high and provides opportunities for spending on travels, cultural entertainments, having a hobby and spending one’s free time in an interesting way, even as a compensation for the shortage of free time in the years of employment during working age. The high taxes in some European countries also have discouraging effect on continuing employment after retirement. The lower amount or absence of social insurance contributions for some insurance risks is an incentive to hire pensioners and extend their working life.

In 2013, the employment rate for the age group 55-64 completed years is 47.4%. It increases by 1.7 percentage points against 2012, by 2.1 percentage points for women and by 1.1 percentage points for men. The employment rate in the 20–64 age group is 63.5%. In the 64+ age group the economic activity slumps – the number of employed persons is only 48.5 thousand or 3.5%.

In 2013, the main flow of unemployed persons in the labour offices consists of employees dismissed periodically, not under mass redundancy procedures, mainly from small and medium-sized enterprises on account of decrease in the volume of some economic activities.

As a result of the population ageing continuing over the past 25 years, this group remains persistently large. Employment Agency’s administrative statistics of registered unemployment⁵ shows increase in the monthly average number of unemployed persons in 2013 in 5 age groups, the greatest increase registered in the 55+ age group – by more than 4 000 persons. In relative terms, the highest values are registered for the groups of unemployed persons aged 50+, with the proportion decreasing in the 50-54 age group and registering the highest increase over the year registered in the 55+ age group.

⁵ 2013 Annual Review, Employment Agency





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At the end of 2013, unemployed persons aged 50+ are 133 021 in number, the group increasing by 4 584 people (3.6%) against the end of 2012. The share of unemployed persons aged 50+ in total unemployed persons in the country who are 386 177 in number, increases from 35.2% in 2012 to 35.8% in 2013. The long-running trend of unemployed people without qualification – 52.0% (against 53.6% in 2012) and with primary and lower educational attainment – 47.5% (against 49.3% in 2012) making up the highest relative share in the group of unemployed persons aged 50+ persists. Positive is the fact that the shares of both subgroups decrease notably in 2013. The share of long-term unemployed in people aged 50+ remains almost unchanged – 40.3 % in 2012 and 40.4% in 2013.

Continuing vocational education and training

Access to and participation of elder people in education, training and skills development is very low (less than 2%), although it increases over time.⁶ A little higher is the share of persons who have participated in self-education – 26% in 2011 but compared to 2007 this indicator decreases – from 36% to 26%. Significant impact on the level of participation shows the completed degree of education or the better “educated” a person is, the greater is the possibility that they engage in self-learning. Two fifths of the persons with a higher education degree (40.0%) have participated in some kind of self-education while the percentage of those with primary or lower education is 12.0% .⁷

Health at the workplace

Data at EU level show that the most common health problems in the workplace reported by the European citizens are stress, depression and tension (51%). The survey shows that these health risks affect a smaller portion of Bulgarians (44%), but here they also prevail. Another negative factor for Bulgaria is the noise exposure, the results for our country (27%) exceeding by ten percentage point the EU average (17%).

In Bulgaria, total satisfaction with the working conditions is very close to the EU average (Bulgaria: 75% satisfaction against 24% dissatisfaction; EU: 79% satisfaction against 20% dissatisfaction).

Compared to the EU average, in Bulgaria it is more common for workers and employees to receive consultations on problems related to health and safety in the workplace (78% in Bulgaria against 62% EU average).

Regarding the working environment, data show that the occupational problems which are most commonly reported by Europeans include joint and muscle pain (27 % of the respondents) together with stress, depression and tension in the workplace – also 27 % of

⁶ Source: NSI Labour Force Survey

⁷ Source: NSI Adult Education Survey, 2011





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respondents. In Bulgaria, such problems are less commonly reported by workers and employees: 22% report stress and tension and 17% report muscle and joint pain. The share of people who have had to take sick leave for occupational health problem is comparable to the EU average – 35%. The length of sick leave in Bulgaria concentrates to a greater extent in the 4 days – 2 weeks span, whereas the EU average for the share of people taking sick leave with such duration is 14%.

An important factor in examining the data about the healthy working environment is the extent to which employers take measures in relation to the health of their employees. Data show that the higher attention paid to the health of employees, the greater their satisfaction with the working conditions. At the EU level, more than 62 % of the respondents report to have received consultation regarding a health problem and are satisfied with their working conditions.

Another important point to be highlighted is the fact that the bigger the company the persons work in, the higher the care for the health of the employees. Companies with up to 10 employees are found to have the lowest level of care for the health of their employees and of health consultations and, respectively, they are found to have much lower level of satisfaction with the working conditions.

23% of respondents in Bulgaria report that the company they work in takes measures to adapt working conditions to elder employees. In this respect Bulgaria lags far behind the EU average (31%) and especially behind the leaders UK (55%), Malta (36%), Finland (35%) and Slovakia (35%), Italy (34%).

Age-related management strategies

One of the characteristics of the Bulgarian working environment is that a very small portion of the workers and employees have possibilities for flexible working arrangements. In countries like Denmark, the Netherlands, Belgium and UK the share of workers and employees who can benefit from flexible working arrangements is more than 70% whereas in Bulgaria it is only 22%, shows Eurobarometer “Working Conditions” 2014. Nevertheless, the practice of actually using flexible working arrangement is quite limited and even in the countries that are top performers on this indicator only half of the workers or employees actually use or would use at some point the potential of flexible working arrangements. Encouraging employers to create conditions for flexible working arrangements is an important element of the approaches and conditions for adapting workplaces to higher age and to enhancing the capacity of elder people to reconcile work and care.

A national survey of the working conditions in Bulgaria shows that a significant portion of the managers in the Bulgarian enterprises are aged 41+. The share of managers aged 41+ in the





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different economy sectors is quite high altogether – between 60% and 90%. This is because a senior position requires high educational attainment and experience and that takes time, and, second, a senior position is usually taken after some career advancement, which also takes time.

Interesting is also the fact that young people are more rarely demanded by managers outside working hours whereas the oldest workers are asked for more frequently. That means that elder people have their important place in the companies and although there is lack of specially designed age-related management policies, their career development receives special attention when it comes to the more knowledge-intensive sectors where experience and knowledge are highly valued. An additional advantage of elder workers is the fact that they can be available, if necessary, because they are less engaged in raising children or in other type of family care.

Age-related services for elder workers

From the perspective of the individual employer, the legislation does not contain explicit requirement for encouraging and adapting the career development and the working conditions to the changing needs of workers as their age increases. There is a significant dividing line in the attitude to elder people and to their experience, depending on the type of business and the transformations to which the sector has been exposed in recent years. In a number of sectors the period of transition to market economy and the structural changes have led to radical change in the business processes and in the specific models of production and work. In those sectors preserving the experience was not an asset and there was absence of policies for age adaptation of career development and working conditions. This trend is valid to a great extent also for comparatively new sectors and economic activities which did not exist in the economic life before 1989, or for dynamically changing ones. On the contrary, areas which are based on exact and natural sciences, traditional productions, and sectors with lower volatility of activities and processes preserve to a much greater extent the experience of their employees and have management focused on the needs and specifics of elder people. Along with that, a number of sectors in services give priority to younger workers and employees, relying on their faster getting into the swing of the work. On one part, these are sectors which do not require long-running and profound training and, on the other part, the age criterion is, although not explicitly, a major element of the selection criteria in those sectors.

Employers do not make particular efforts to avoid early retirement. This is a process regulated to a much greater extent by the policies and changes in the pension system and the related incentives.

The practice in Europe shows that in relation to age management the organisations and the



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companies apply more often than not ad-hoc solutions and rarely use a long-running and proactive approach for adapting the workplace to the problems of elder people.

Prevention of age discrimination

In the period 2011-2014, only 18.75% of the complaints registered in the Fifth Permanent Sitting Panel of the Bulgarian Commission for Protection against Discrimination are for **age** discrimination. But only a few of them end with positive decisions for existing discrimination. In the majority of cases they are dismissed. The complaints concern individual cases of discriminatory treatment. The Commission is also approached on matters concerning the regulatory framework (age limits in the selection of jury, appointment of experts, starting work as personal assistant, etc.).

In the age discrimination section, the public perceptions of age discrimination in the EU register a value of 58% and it ranks second after the perceptions and attitudes regarding ethnic discrimination (61%). In Bulgaria, the average value for public attitudes and perceptions of age discrimination is 58% and that is fully in line with the attitudes of the EU citizens (Eurobarometer 317 of 2009 – Discrimination in Europe). At the same time, the attitudes and expectations of the Bulgarians about age discrimination in the case of job placement are considerably higher compared to the EU citizens (69% in Bulgaria against 48% EU27 average). An additional indicator of public attitudes is the fact that on a scale from 1 to 10 the average assessment of Bulgarians concerning their level of acceptance of the assumption of the highest political post in the country being held by a person aged 75+ is only 3,3 (whereas the EU average is 4,8).

The results of the National Representative Survey of Equality and Discrimination conducted by NCIOM (National Centre for Public Opinion Research) under Project “Progress to equality: national, effective and innovative practices for preventing and combating discrimination” within Progress Programme of the European Commission and presented in the National Concept for Promotion of Active Ageing in Bulgaria (2012-2030) shows the following attitudes:

Attitudes to people aged 50+

It is more common for women (60,5%) than for men (55,4%) to assess being over 50 as a disadvantage and thus it can be assumed that after the age of 50 the risks of multiple sex- and age-based discrimination are higher for women. In the settlements other than the capital city – particularly in the smaller towns and villages, being over 50 is assessed as a disadvantage by a little more than half of the respondents but also more than one third accept this fact neutrally. By comparison, almost three fourths (73%) of the residents of Sofia assess the higher age as a disadvantage.





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About one third of employers (directors/managers and owners of companies with less than 10 employees) accept neutrally the membership of this social category, but the rest consider being above 50 as a disadvantage. 81% of the employers – company owners with more than 10 employees, accept neutrally the membership of this category and for 19% it is a disadvantage.

Personal experience of discrimination

Discriminatory treatment is more common among people aged 50+ and the Roma. Age discrimination – 13,4% is more common among people aged 50+ (29%) and less common among younger people (13,5%). Age discrimination is more frequently reported by people with tertiary education than by people with lower educational attainment and more frequently by Turks than by the Roma.

Willingness to support vulnerable groups

Persons with disabilities enjoy greater tolerance compared to the other social groups. 64,6% of all respondents would help people with disabilities with donations or voluntary work. All other groups show much lower willingness for personal commitment (less than 10%). The greatest solidarity is registered towards young people – 9,2%, and the least towards the socially disadvantaged – 0,4%, and towards single mothers – 0,1%. Obviously, the negative stereotypes with regard to single motherhood are not put aside. One in ten respondents report they would not help any of the social groups mentioned.

Preferred social groups for which funds (in %) for programmes facilitating the access to education should be allocated as a matter of priority

Employers – directors / managers, do not support the idea of a need of educational programmes in favour of particular groups.

The support for young people under 25 years is twice bigger than the support for people aged 50+.

Equality in the access to the labour market

In the context of increased importance of competition, it is vital to ensure equality in the access to the labour market. The quality of employment and the opportunities for professional development have a major influence on the level of lifetime earnings. Employment has effect also on the quality and frequency of social contacts, on the opportunities for access to quality services. The overall assessment of the employment situation, as well as of the various unfavourable aspects resulting from individual characteristics, from convictions and actions for protection of fundamental civil rights, is therefore important. Contributive of such overall assessment is the reporting of





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comparatively weaker forms of exclusion and non-acceptance, for example, the feeling of different, mostly negative attitude to individuals, but also the refusal to appoint a person to a job because of certain individual characteristics.

The following facts have been identified at the mass-mind and at the public opinion level:

- Age is the most common contributor to different treatment from colleagues or employers – 9.3% from colleagues, 8.3% from a superior and 2.9% from external counterparties, clients, suppliers, couriers, etc.
- Age (15.5%), ethnic origin (5.5%) and sex (3.9%) are most frequently reported by respondents as reasons for refusal to be appointed to a job.
- Age (15,5%) is three times more common reason for refusal to appoint to a job compared to ethnic origin (5,0%), 4 times compared to sex (3,9%), 4,5 times compared to having a small child in the family (3,3%), and almost 10 times compared to having a disability (1,6%). Age is the most common reason for refusal to appoint to a job people aged 50+ – 30,6% of the cases, followed by persons aged between 18 and 29 years – 18,8%, and people aged between 40 and 49 years – 19,1%. In other words, discrimination of people in late professional careers is almost twice higher compared to the other age categories. Refusal to be appointed to a job affects mostly people with primary and lower education – 44,0% of all persons with such level of educational attainment. Refusals make up a significantly smaller share for people with higher educational attainment (college or university) – respectively 28,0% and 16,0%. The Roma suffer most from age-based refusal to be appointed to a job, followed by Turks – 10,0% (by comparison, the share of respondents reporting to have been refused on the same grounds is 15,0% for the ethnic Bulgarians). People living in the villages were more frequently refused to be appointed to a job on account of age (19,5%) compared to the residents of towns and district centres – respectively 15,1% and 14,7%. People living in poverty are refused to be appointed to a job on account of age twice as frequent as people not living in deprivation – respectively 21,1% and 12,1%.

In cases of multiple discrimination, age appears as one of the significant co-existing elements.

Age is the most common reason for employers' refusal to promote their workers and employees. The obstacle to career promotion is given for young people (18-29 years) and for people aged 50+ – respectively by 5,5% and 6,0% of all respondents at that age.





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Persons with disabilities (88.0%), people aged 50+ (83.4%) and those with non-white colour (66.4%), have the smallest chances to be appointed to a job, to receive additional training or career promotion.

According to more than half of the respondents, greater than average risk of dismissal or transfer to a less paid job in the years immediately before retirement exists for the Roma (56,4%) and the persons with disabilities (54,0%). Women are also at risk (47,7%) – by comparison, for men this risk is reported by a smaller number of respondents (34,8%).

Access to health and social services

The most accessible services are provision of food (88,4%) and transport (82,4%), whereas access to social services raises the highest concerns – 41,6%. Social care for elder people and people in need is unusable because of the absence of such service according to 21,1% of the respondents. Other 30,2% are not aware that such type of services exists as an option.

A small share of respondents report having difficulties with the access to health services on account of individual characteristics: ethnos – 3,3%, age – 2,9%, and disability – 1,8%.

Most limited is access to dental care, due to financial reasons (36,4%). Access to dental care (14,3%) and pharmacy (12,4%) also depend on the place of residents and are not usable everywhere. Elder people are the group for which such services are inaccessible in many cases.

Health services are used on a limited basis by 6,8% of respondents because of the shortage of doctors and medical services, other 6,1% do not use them because of absence of doctors and health establishments in their place of residence. As a higher proportion of elder people live in the villages compared to the national average population distribution, elder people are more often found in the groups with limited access to doctors and medical services.

In the five years up to 2009, the share of public attitudes and perception of age discrimination doubled. Reasons could be attributed partly to the economic crisis and the higher security of elder people’s jobs. However, the negative changes in the intergenerational attitude and in the system of values with regard to old age and ageing should not be neglected. The above factors as a whole as well as some deficits in the anti-discrimination training of supporting specialists contribute to the negative perceptions and discriminatory attitudes to elder people in the sphere of social and health services.

Although such practices are decreasing and discussions on the topic have informative effect, employers still set, although in a small number of cases, age requirements for the recruitment of staff. Age-related social stereotypes continue to exist with regard to some professions and positions (mainly in services to the population). In general, employers and the other workers and employees see the advantages and the contribution of elder workers



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and employees and how they enrich the working environment and processes. Experience is one of the most important labour market advantages according to 53% of Bulgarians. However, at the same time, there are perceptions that elder employees lose motivation and willingness for professional development, and employers do not develop special programmes for adaptation of elder employees to the changing environment. A positive trend is registered in employment of people in pre-retirement age. In contrast with the many years of transition and structural reforms in many economic sectors, employment of persons in pre-retirement is now similar to those of the other age groups.

Tax and benefits systems helping to promote employment

The national social insurance systems of the counties differs depending on the status of the persons – employed, self-employed, employers, unpaid family workers. Employers, self-employed people and unpaid family workers can have greater influence on the number and distribution of working hours and enjoy more flexible employment arrangements. Employed persons are more restricted in this option, but on the other hand they enjoy greater social protection, tradeunion protection, and their prevailing share in total employed persons gives greater social prominence and publicity of their employment problems which are thus resolved in a more urgent manner. Achieving acceptable and sustainable balance between length of working life and time spent in retirement by motivating those who have acquired right to a pension to continue their active working life if their fitness to work and health status so permit, with special focus on the early retired, is therefore essential..

The Bulgarian public social insurance system functions on a pay-as-you-go principle. This means that receipts from the social insurance contributions of current workers should cover the costs of pensions. However, at present receipts from social insurance contributions cover less than 2/3 of the costs of pensions and the deficit is being covered from the state budget. The demographic trends connected with population ageing, increased average life expectancy and decreasing number of people in working age have negative effects on the social insurance system because, on one part, the number of contributing persons decreases and, on the other part, the pension period gets longer and the number of persons receiving pensions increases.

Obviously, if the public social insurance system is not stabilised financially by increasing receipts and limiting costs, it would not be possible to maintain the income of the present or the future pensioners.

A major problem of the current social insurance system in Bulgaria is its financial instability. Pay-as-you-go pension systems like the Bulgarian one are distributors of resources from the current working generation to the pensioners. In general, to ensure the stability of those





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pension systems, costs should not exceed receipts, i.e. the pensions paid by the system should not exceed the social insurance contributions.

At present, the Bulgarian pension system is facing serious challenges. The major problem is the long-term trend of financial instability of the Public Social Insurance (PSI) system which could generate too large budgetary commitments for the State in the future.

According to MF data and on the basis of expert analyses (see, Handbook “Innovative Approaches for Promoting Decent, Healthy and Active Ageing”, Sofia 2013, Ministry of Labour and Social Policy, p. 88/), receipts from social insurance contributions secure pension costs to a lesser extent (from about 97% in 2000, the share of receipts from pension contributions in pension costs go down to 50% in 2011). The ultimate consequence is increasing financial dependence of the Public Social Insurance system on the state budget and higher financial commitments for the latter.

Another major problem is the significant increase of disability pensions. According to an analysis of the disability pensions in the period 2000-2014, conducted by the National Social Insurance Institute, at the end of 2000 personal disability pensions financed from the Public Social Insurance system and the republican budget numbered 323 517. At the end of 2014 they numbered 907 380. Over that period, their number increased by 583 863 pensions, or 2,8 times.

Given the permanent population ageing trend, pension costs are bound to increase significantly in the future. It should be borne in mind that the measures taken to stabilise financially the pension system are important for improving the standard and quality of living of current as well as of future pensioners.

Major changes in the pension system in 2015 include:

❖ In 2015, the age for entitlement to pension under Article 68, Para 1 and Para 2 of SIC is maintained at the 2014 level but the contributory service was increased by four months. The conditions for entitlement to pension in 2015 are:

- **Men** – completed 63 years and 8 months and 38 years of contributory service;
- **Women** – completed 60 years and 8 months and 35 years of contributory service.

❖ The age for entitlement to pension under **Article 68, Para 3 of SIC** upon 15 years of actual contributory service is also preserved at the 2014 level and is 65 years and 8 months for both genders in 2015.

❖ Ministerial Decree No. 130 / 28 May 2015 sets out a **new amount of the social old-age pension** – BGN 115,15 per month, starting from 1 July 2015, which amount includes




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also the 2015 adjustment of this pension pursuant to Article 100 of SIC. For the period between 01.01.2015 and 30.06.2015, the social old-age pension is BGN 113,00 per month.

❖ From 1 July 2015, non-work contingent pensions are determined as a percentage of the social old-age pension.

Table 1: Amounts of non-work contingent pensions and benefits, which are linked to the amount of the social old-age pension as at 1 July 2015.

Pensions from the state budget	Amount from 01.07.2015 (BGN)
1. Social old-age pension – Article 89a SIC	115,15
2. Social invalidity pension – Article 90a SIC, for reduced working capacity:	
- more than 90 percent rwc (120 % of the social old-age pension)	138,18
- 71-90 percent rwc (110 % of the social old-age pension)	126,67
3. Military invalidity pension – Article 85 SIC	
a/ privates and non-commissioned officers, for reduced working capacity:	
- more than 90 percent rwc (150 % of the social old-age pension)	172,73
- 71-90 percent rwc (140 % of the social old-age pension)	161,21
- 50-70,99 percent rwc (115 % of the social old-age pension)	132,42
b/ commissioned officers, for reduced working capacity:	
- more than 90 percent rwc (160 % of the social old-age pension)	184,24
- 71-90 percent rwc (150 % of the social old-age pension)	172,73
- 50-70,99 percent rwc (120 % of the social old-age pension)	138,18
4. Civil invalidity pension under Article 87 SIC:	
- more than 90 percent rwc (150 % of the social old-age pension)	172,73
- 71-90 percent rwc (140 % of the social old-age pension)	161,21
- 50-70,99 percent rwc (115 % of the social old-age pension)	132,42
5. Personal pensions under Article 92 of SIC (90% of the social old-age pension)	103,64
6. Attendance supplement under Article 103 of SIC (75% of the social old-age pension)	86,36
7. Supplement to pensions of war veterans pursuant to Decree No. 1611/85 (50% of the social old-age pension)	57,58
8. Supplement to pensions of war veterans pursuant to Article 5 of	115,15



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the War Veterans Act (100% of the social old-age pension)

On the grounds of Article 9 of the 2015 Public Social Insurance Budget Act (PSIBA), **the minimum contributory-service and old-age pension** under Article 69, Para 1 of the Social Insurance Code is **BGN 157,44** from 1 July 2015. Between 1 January and 30 June 2015, the minimum contributory-service and old-age pension was BGN 154,50.

Table 2: Minimum amounts of the personal contributory service pensions, which are linked to the amount of the minimum contributory-service and retirement-age (CSRA) pension from 1 July 2015.

Work-contingent pensions	Minimum amount from 01.07.2015 (BGN)
1. Personal contributory-service and retirement-age pension – Article 68 of SIC:	
- under Article 68, Para 1 (minimum CSRA pension)	157,44
- under Article 68, para 3 - (85 % of the minimum CSRA pension)	133,82
2. Personal general-sickness invalidity pension – Article 74 SIC, for reduced working capacity (rwc):	
- more than 90 percent rwc- (115 % of the minimum CSRA pension)	181,06
- 71-90 percent rwc- (105 % of the minimum CSRA pension);	165,31
- 50-70,99 percent rwc- (85 % of the minimum CSRA pension)	133,82
3. Personal employment-injury and occupational-disease invalidity pension – Article 79 SIC, for reduced working capacity (rwc):	
- more than 90 percent rwc- (125 % of the minimum CSRA pension)	196,80
- 71-90 percent rwc- (115 % of the minimum CSRA pension)	181,06
- 50-70,99 percent rwc- (100 % of the minimum CSRA pension)	157,44
4. Survivor pensions under Article 81, Para 2 of SIC (75 % of the minimum CSRA pension)	118,08

❖ Pursuant to Article 100 of SIC, pensions granted till 31.12.2014 inclusive, were adjusted from 1 July 2015 **by 1,9 percent** on the grounds Decision of the Supervisory Board of NSSI.



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❖ From 1 July 2015, the maximum pension under §6, Para 1 of the Transitional and Final Provisions of SIC is BGN 910 or 35 per cent of BGN 2600 (the maximum contributory income for 2015, determined with the 2015 Public Social Insurance Budget Act).

In 2015, the Council of Ministers approved at two instances the payment of one-off supplements to pensions.

Additional transfer in the amount of BGN 50 million to the 2015 PSI budget was approved with Ministerial Decree No. 49/06.03.2015 for payment of one-off supplement to April 2015 pensions. One-off supplement to April 2015 pensions in the amount of BGN 40,00 was paid to pensioners whose pension or the sum of the pensions together with the supplements and compensations thereto amounted up to BGN 286,00 inclusive.

Additional BGN 51 million was approved with Ministerial Decree No. 310 / 11.11.2015 for one-off supplements to December 2015 pensions. The supplement was in the amount of BGN 40 and was paid to pensioners whose pension or the sum of the pensions together with the compensations thereto for December 2015 amounted up to BGN 300,00 inclusive.

The average monthly **number of pensioners** was **2 177 716** persons in 2015. Compared to 2014, their number **decreased by 4 180 persons**.

The average monthly **number of pensions paid** in 2015 was 2 658 461 – **10 599 pensions less** compared to 2014.

In 2015, pension costs as a **percentage of GDP** made up **9,7%**. In 2014 they were also 9,7%.

The average monthly amount of the pension of one pensioner was **BGN 321,78** in 2015. The average pension paid to men was BGN 385,52 and to women – BGN 275,43.

In 2015, the nominal increase of the average monthly pension was 3,8 percent and the actual increase was 5,0 percent, with average annual harmonised index of consumer prices of 1,1 percent in 2015.

According to experts in this matter, the decreasing and ageing population trends will continue to have additional negative effect on the stability of the pension system and the sustainability of public finances. An adequate and sustainable pension system in the long run is essential for preventing poverty and social exclusion of elder people who are one of the vulnerable social groups. In that light, a key priority of the pension policy pursued is to ensure adequate pension income for all, which guarantees reasonable standard of living after retirement. It is of utmost importance to promote active ageing and that means that conditions enabling elder workers to remain longer in the labour market should be created in the first place. All unfavourable trends mentioned above call for a new strategy for financial stabilisation of public social insurance and improvement of the pension legislation.





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Experience sharing

Experience sharing is an important prerequisite for national economic development and it is realised within a professional domain, within a company or a sector, as well in the business field in general. Elder entrepreneurs are valuable resource for other entrepreneurs. Retired businessmen have valuable knowledge and experience and can contribute to the easier start up and management of an undertaking than if inexperienced entrepreneurs acted on their own. Such knowledge is valuable European and national capital and should be used really well.

In the Bulgarian context, preserving the experience built up is not perceived by the business as a systematic need. Reasons are in the transforming economy in the late 20 and early 21 centuries. In that period of significant transformation most of the sectors went through structural reforms and significant changes in the working and production models. Enterprises were closed and the new ones opened, mainly with foreign investments, brought in new business processes and technologies. This context was not conducive of preserving the experience built and that is why elder workers were not preferred in the labour market. The cyclical changes and the generational handover will create more opportunities and willingness to preserve the experience built up and that should be accompanied by tailoring more models and policies in this context.

Reconciliation of work and care

According to researchers, working hours can be viewed in the broader and in the narrower sense: in the narrower sense, they are the time spent in the workplace. But in the broader sense, they are also the time which employees take to commute between home and work, as well as the time they devote to unpaid work, mainly at home, to care for small children and elderly people. Data show that women are engaged to a greater extent than men in household work, child raising and care for elderly people. There is drastic difference between women and men in respect of the daily care of the home – 65,7% of women in Bulgaria devote one or several hours to domestic tasks whereas that is true only for 9,3% of men.

With a view to painting the general picture of the “**working hours**” element by sector, a composite indicator was created within the survey on the basis of the following positions verified in the survey: weekly activity rate of 50+ hours; weekly activity rate of 6 and 7 days; time for commuting from home to work exceeding 45 minutes per day; night work more than 16 times per month; evening work more than 16 times per month; work on Sundays 3 – 4 times per month; work on Saturdays 3 – 4 times per month; working longer than 10 hours per day more than 16 times per month; an hour or more of childcare every day, less than an hour a day and once or twice a week; taking care of the home every day for one or several





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hours, every day for less than an hour and once or twice a week; care for elderly people every day for one or more hours, every day for less than an hour and once or twice a week.

The results show that many working Bulgarians are exposed to a greater extent to risks associated with longer working hours and are thus restricted in respect of the time for leisure and recreation. At the same time, the results also show that there is still room for more active involvement of elder people in the raising of children and grandchildren with a view to giving room to parents to relax and devote themselves to their career. Despite the national traditions, our country is not among the leaders on this indicator. About 27% of the people aged 55+ take care of their grandchildren at least once a week. 19 Member States are higher in the ranking on this indicator, including the top performers Cyprus (45%), Slovenia (41%), Ireland (39%), Hungary (39%), Belgium (39%), Czech Republic (37%), Spain (36%), France (35%) etc.

At the same time, a significant part of the people aged 55+ are faced with the need to care for their elderly parents or other sick relatives (12%). This has greatly exacerbated the problem of the reconciliation of work and care by those groups, the extent to which are prepared to provide such care and the support they need.

1.2. Specific national and regional challenges and opportunities for promoting active ageing in the participation in society domain

Income security

As Bulgarians grow older, their disposable income decreases but still it remains at levels close to the income levels of people under 60 years of age. These results show a positive trend of increasing income of elder people which is related to a great extent to the pension reform implemented in the country. However, income of elder women aged over 60/65 years as a percentage of the income of those aged under 60/65 years remains lower than the income of men. Reasons are the length of service and the category of work performed by women, as well as the periods of long-term unemployment at the time of the structural reforms in the 1990ies.

As a result of the pension system reforms and the stabilised labour market, the income of people in pre-retirement age (55-64 years) is a little higher than the income of the other age groups in the country (all under 60 years). This indicates a very high incentive for formalisation of the incomes of people in pre-retirement age, and that the reforms and campaigns to raise the motivation for compliance with labour laws have worked in practice.

Despite the positive trends, the people aged over 65 remain the most vulnerable group in respect of the quality and standard of living and the risk of poverty. The results show exceptional dependence of those groups on social transfers and the pension system. About





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80% of elder people (over 65 years) would belong to the “poor” category, were it not for the social payments made by the State.

After the social transfers, by 2014 the share of the poor aged over 65 comes close to the national average. While the period between 2006 and 2010 can be distinguished by higher concentration of poverty among the elder population, following the pension increase after 2009-2010 the share of the poor in the population aged over 65 gradually aligns with their share in the total population. Despite this positive trend, the gender-based differences remain significant. Elder women are affected by poverty to a much higher extent than elder men. Reasons are mainly the pay differences which lead to differences in the pension amount. It is more common for women to perform work of lower category with lower pay and they also lose a portion of their contributive income in the child-raising periods.

Especially vulnerable remain elder people living alone, whose income does not enable them to cover the costs of their households without a significant effect on their standard of living. Elder people living alone run a twice higher risk of poverty than those who live in two-member households. There is, however, a positive downward trend in poverty among elder people aged over 65. In 2008, 67,8% of the elder people aged over 65 living alone were poor, whereas in 2015 the share is 53,4%. The trend is similar for elder people living in two-member households but the share of the poor is lower – 28,7% in 2008 and 21,8% in 2015.

In the pensioners group, the share of poor women is higher than the share of poor men and the differences are again significant. What is more, this poverty is lasting – poverty among women aged 60+ is higher than poverty among men aged 75 and over.

Disparities in income distribution are smaller among elder people compared to the other social groups. To a large extent, this is the result of the “ceiling” on pensions and the maximum amount of contributions, which have restrictive effect on the pension amount.

Similar to poverty decline, the share of elder people living in material deprivation also decreases gradually in recent years, but the differences between women and men remain. Similar is the trend for the risk of poverty. In 2006, at the risk of poverty were more than three fourths of elder people, whereas by 2015 their share decreases to 51,2%, but remains higher among women compared to men.

The share of the working population aged over 65 years at risk of poverty is lower than the average poverty risk among workers across the country. However, the general upward trend of the share of working poor is not confirmed for the working poor aged over 65 whose number decreases after 2012.⁸

⁸ According to EUROSTAT data for 2006-2015





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The burden of household spending remains high for the people aged over 65. As mentioned earlier, elder women are usually more affected, especially if they live alone.

The share of households with one or two elder people increases from 13,2% in 2006 to 17,7% in 2015.⁹ This means that most of the elder people live independently and have their own home which they do not need to share with the next generations. Although that is not statistically evident, due to health and social status specificities, to the overall effect of the transition and reforms on the generations, and to premature deaths (before reaching the age of 60-65 years), an increasing share of elder people lose their heirs and remain without support from relatives. Enhanced emigration is a further factor in that direction. This has greatly exacerbated the problem of the access to social services and the development of a local support network for elder people who have no relatives or their relatives are far away.

As people grow older, material difficulties and deprivation increase because the higher age groups have lower pensions, on one part, and higher spending on medicines and health care, on the other part. Again, women are more vulnerable because their life expectancy is higher and it is more common for them to remain alone in old age, while at the same time their pensions are generally lower than those of men. Compensating women who have lost their husband with a portion of the pension he had received in his lifetime cannot make up for the disparities in income. A significantly higher share of women in the higher age groups experience more severe material deprivation than men of the same ages.

The purpose of pensions is to guarantee adequate income level for people who have exited working age. The challenge of ageing population and a need to maintain adequate and sustainable pension levels, which Member States are faced with, have been pointed out at a number of European Council meetings.

The replacement rate is an important measure of the well-being of elder people. It is defined as the ratio of the median gross pension of persons aged 65-74 to the median gross earnings of people aged between 50 and 59 years, exclusive of any other social benefits. The replacement rate shows the level of pensions of retired persons against the earned income of the people in the pre-retirement decade.

In 2006¹⁰, total replacement rate is 37.0%, being a little higher for men - 41.0%, compared to women - 36.0%. In the following years, the rate gradually increases to 41% in 2015, up 4.0 percentage points. The increase for men and women is respectively 6.0 and 2.0 percentage points. This indicator shows the level of pensions of retired persons against the earned

⁹ According to EUROSTAT data for 2006-2015

¹⁰ According to EUROSTAT data. The aggregate replacement ratio is a ratio between the income from pensions of persons aged 65 – 74 and income from employment of persons aged 50-59.





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income of the people in the pre-retirement decade. The data show that despite the increase, in recent years pensioners receive less than what the workers in the pre-retirement age group receive. By comparison, the EU 27 average for this indicator moves around 54-56% in recent years.

Another statistically evident positive trend is the decreasing share of people living in material deprivation. This indicator is constructed on the basis of: durables held, ability to afford unexpected expenses, etc. In the period 2006-2015¹¹, the share of households living in material deprivation decreased significantly: it almost halved among men aged over 65, but was weaker among women aged over 65 (down from 72,6% to 45,3%). The results show again that women aged over 65 are one of the most vulnerable groups and their material status improves at a slower pace compared to men.

Social inclusion

Participation in cultural life and going to cultural events

The low level of participation in cultural life indicates that elder people in Bulgaria are less active. 2013 Eurobarometer data (Special Eurobarometer 399, Cultural access and participation) show that elder people in Bulgaria participate to a lesser extent in different forms of cultural life compared to the other groups in the country and compared to the other EU Member States.

Respondents from the EU Member States were asked if they had participated in a range of different cultural activities in the last 12 months, and how many times. The biggest share of respondents from Bulgaria as well as from the EU in general have participated in relatively affordable activities that can be done at home – watching or listening to a cultural programme on the TV or the radio (72% in the EU and 71% in Bulgaria) or reading a book (68% EU average and 55% in Bulgaria). The least popular activity among respondents was going to see a ballet, dance performance or opera (18% in the EU and 11% in Bulgaria) whereas going to the theatre (28% in the EU and 24% in Bulgaria) and visiting a public library (31% in the EU and 18% in Bulgaria) are comparatively more widely met. The results show that, as a percentage, the Bulgarians are less actively involved in different types of cultural activities compared to the other EU citizens (45% not actively involved in Bulgaria and 34% EU average). Bulgarian youths as well as EU youths are comparatively more active than the other social groups. In Bulgaria, the share of less actively involved youths in total young people is 32%, (EU average 26%). As people grow older, the percentage of less active persons increases. Low level of involvement in cultural activity is also registered among

¹¹ According to NSI data





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people with lower educational attainment (77% in Bulgaria and 55% in the EU) and people who have difficulties paying bills (60% in Bulgaria and 48% in the EU).

Asked about the barriers to accessing culture, respondents give lack of time and lack of interest as reasons. Lack of interest is given as a reason for not going to a ballet, dance performance or opera (50% in the EU and 36% in Bulgaria), a public library (43% in the EU and 48% in Bulgaria) and a gallery (35% in the EU and 35% in Bulgaria). In contrast, a majority of respondents give cost as the reason for going less often to the theatre, to a movie, or to a concert. In Bulgaria, young people account for the smallest percentage (26%) of respondents giving “lack of interest” as a reason, whereas for the EU in general this group accounts for the highest percentage (44%). The strongest factor for the low concert attendance of the Bulgarian population is expense (34%), whereas that is given as a reason by only 18% of the same age group in the EU.

Respondents participate in non-national cultural activities mostly by reading books by authors from other European countries (31% in the EU and 29% in Bulgaria) or by watching or listening to a cultural programme on TV or on radio from another European country (27% in the EU and 34% in Bulgaria). A small number of respondents from Bulgaria (less than 8%) report to have visited different cultural events or historical sites, in contrast to respondents from other European countries where the percentage is higher. Low participation in activities in another country could be explained by the low standard of living and expense.

Out of a list of different cultural activities, 86% of Bulgarian respondents report to have participated in none in the last 12 months, whereas the EU average is 62%. Despite that, a small percentage of respondents report to have danced and 5 have sung. The most common activity for all EU Member States in general is dancing (13%), followed by photography or making a film (12%), singing (11%) or participation in artistic activities such as painting, sculpture or handicrafts (10%). A trend of respondents becoming less active in respect of the participation in different artistic activities as they grow older is registered in both populations. In Bulgaria, a high percentage of inactivity is registered right from the first age group 15-24 years - 72% which increases to 93% in the group of persons aged over 55.

The share of respondents in Bulgaria who report not using Internet for cultural purposes (searching for cultural information, buying cultural products or reading articles related to culture) is higher than the EU average (29% for the EU and 35% in Bulgaria). Only 4% of Bulgarians use Internet in relation to culture. The highest share of respondents in Bulgaria use Internet to read articles (43%), followed by downloading music (45%), listening to radio or music (40%), downloading movies, different programmes (35%). A similar trend is registered in the other Member States – 53% of respondents read Internet articles, 44% search for information about cultural events and 42% listen to music or radio.





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The data analysis shows that the main factors for the low participation of Bulgarians in cultural life are lack of interest and time as well as expense. Expense is also the main obstacle for the active participation of people aged over 55 in out-of-home cultural activities.

An additional factor that influences the cultural activity of elder people in Bulgaria is the access to cinema, theatre and cultural centres. As mentioned earlier, in Bulgaria the majority of elder people live in the small towns and in the villages (approximately 60%). About 46% of the Bulgarians aged over 64 report having great or certain difficulties going to the cinema, the theatre or to cultural centres. The reason is that such institutions are concentrated in the capital and the big cities and the access to them is difficult for the other residents of the country. In recent years, the practice of guest performances of theatre troupes and musical groups has been revived. Such practices should continue so that elder people on the ground can have equal access to cultural events.

Physical activity

Data about the physical activity of persons of different ages in the EU Member States from the 2009 and 2013 Eurobarometer (Special Eurobarometer 334; Special Eurobarometer 412) show decrease in the physical activity of Bulgarians. In 2009, 28% of respondents report seldom exercising or playing sport, whereas in 2013 only 9% give this answer and 78% give the answer “never”. Data show significant difference from the answers given by respondents from the other Member States – in 2013 42% report never playing sports which means 30% lower activity of Bulgarians. The highest percentage of respondents in Bulgaria who never or seldom play sport are aged over 40 years (more than 90%), prevalently women. Low activity is registered also in the younger groups – 50% of the respondents aged between 15 and 24 do not play sport. In terms of the social status of respondents, least active are pensioners (96%), unemployed persons (90%) and housewives (100%), show data from the 2013 survey.

The same trend is registered in terms of engagement in other physical activity such as cycling, dancing, or gardening. In 2009, 40% of respondents report doing some kind of physical activity rather regularly whereas in 2013 only 18% give this answer. More than half (51%) say they do not engage in other physical activity. Again, there is great difference from the other Europeans 15% of whom say they regularly engage and 33% say they engage with some regularity in physical activity.

The reasons that drive respondents to engage in different physical activities do not change over the years. The most common reason is to improve health (35% in 2009 and 34% in 2013) and the desire to feel good (18% in 2009 and 12% in 2013). Although health is a major motivator for Bulgarians, they do not mention it with such certainty as the respondents from





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the other EU Member States (62%). Bulgarians also mention frequently having fun, relaxing, and weight control. In 2009, 22% find physical exercise important for their social life.

Respondents consider sport important for their health but the largest proportion of them report not practicing sport because they do not have time (40% in 2009 and 39% in 2013). About 12% of the surveyed report physical disability or illness and 26% of the respondents in 2013 report lack of motivation or interest. The same trend is registered among the other Member States.

The data from the two surveys show that the preferred location for practicing sport is outdoors (45% in 2009 and 25% in 2013). The most common location to practice sport for 2013 respondents is at home, (52%) or on the journey between home and school, work or shops (21%), whereas sport clubs and fitness centres are reported by a smaller percentage, which can be explained by the fact that sport club cards are too expensive.

A majority of the respondents in both surveys say their local area does not offer the residents many opportunities to be physically active. Despite that, there are more mixed views – in 2009 31% of respondents agree that their local area does not offer opportunities, whereas in 2013 the percentage of those who agree decreased to 25%. It should be noted that as time goes on respondents continue to have no faith in the local authorities and tend to agree that the latter do not do enough for their citizens in terms of physical activity (19% in 2013 and 23% in 2009 of them totally agree and 30% in 2013 and 26% in 2009 tend to agree). Despite that, the citizens do not engage in voluntary work that supports sport activities. Data from both surveys show that only 7% of respondents report doing that. 2013 data show that volunteering is more common among students (10%) and managers (10%) whereas pensioners and housewives do not volunteer at all. Respondents outside Bulgaria show opposite attitudes to Bulgarians in the answers to the same questions – almost 80% agree that their area offers opportunities for physical activity and again almost 80% agree that local sport centres offer the necessary conditions for physical activity.

A large majority of the respondents agree that physical activity is important for their health, but a high percentage of them report lack of motivation and willingness as the major factor for the absence of sport in their life. Lack of interest could be the result of the absence of physical exercise habits in the society as well as of low support and motivation by institutions. The citizens of the other EU Member States enjoy a good environment for physical exercise whereas many Bulgarians do not have it. Thus, failure to foster physical exercise proves a problem for young and elder alike.

Despite the weaker participation in sport and cultural activities, elder people in Bulgaria are not excluded from social communication. In contrast to the citizens of the other Member States, elder Bulgarians meet more actively with their relatives and friends: 69% of the



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people aged over 64 meet every day or almost every day. The share of the people who meet seldom or never is less than 7%. This group is small but it also needs special attention. Local authorities and cultural centres could put more effort into covering and encouraging communication between elder people, including those in isolation who require special attention and care.

Communication between elder people is with high intensity but it does not always work in overcoming the feeling of loneliness. Elder people in Bulgaria feel lonely to a greater extent compared to the same age group average for the EU. Reasons for this can be the monotony of their pursuits and the lack of social activity beyond the meetings and talks around their home, as well as the lack of entertainments and activities which could break the monotony of the life of elder people.

More than one fifth of elder people in Bulgaria feel abandoned by society. Developing and improving the coverage of social services as well as building a network for support of elder people in need would be important measures to address this perception.

Although not so high in the social agenda, the perception of tension between generations is found among elder and young people alike. It is however viewed as moderate.

Voluntary activity of elder people

The participation of elder people in different forms of volunteering is low. Reasons for that are the lack of traditions and volunteering forms for elder people. Volunteering campaigns usually cover different youth groups, students or higher-status socially engaged activists. The specific social status and needs of elder people make them more passive when it comes to voluntary activities.

It should be noted that the participation in volunteering by pensioners in Bulgaria, but also in the EU is low. Even countries with many traditions and more-active social life of elder people fail to achieve participation in voluntary activities at more than one fifth of the population aged over 55. Such are for example the northern countries Ireland, the Netherlands, Sweden, and Denmark.

An important element of volunteering promotion is to enable elder people to participate in initiatives according to their interests and abilities, as well as in areas which are close to their professional spheres. In the Bulgarian context, volunteering initiatives often imply some type of physical work (cleaning public areas, helping people with disabilities, etc.) and that is not always what elder people can do and afford. They need other type of voluntary activities in which they could better realise their potential.





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Lifelong learning

The data about participation in lifelong learning and the performance of elder people in learning activities show that in 2014 almost 1 million and 900 thousand people aged over 55 did not participate in any learning activities, be it requalification courses or any learning-related activity in general. The main reason given for the lack of activity is old age – total 1 540 100 respondents say their old age prevents them from participating in different learning activities, followed by poor health reported by 142 400 people.

Distribution by regions shows that the highest number of respondents is in the Southwest Region – 407 800 persons. This is not surprising because the region includes the capital city.

The data for the last 4 years show slight increase in the number of people aged over 55 years who are excluded from learning and educational activities. This means that steps need to be taken to attract elder people to educational activities.

Lifelong learning is about continuous development and improvement of skills and it could enhance the quality of life of every individual. In addition to helping for adaption to the changing environment and to labour market requirements, lifelong learning could also be beneficial for acquiring knowledge about different age-related conditions and symptoms, as well as for better care and quality of life as a result of health culture and prevention. Data show that a policy for involving elder people in activities that could be beneficial for them and their relatives and friends should therefore be pursued. There is a need to identify the activities that would have the strongest effect on their living a more active life and would enable them to feel useful in their activity and thus increase their motivation to participate in social life.

Information and communications technology - ICT

In 2015, use of Internet by households across Bulgaria increased by almost 20% - from 33,1% in 2010 to 59,1% in 2015. The Southwest Region (67,8%) is the top performer and the Northwest Region ranks at the bottom (44,9%) in 2015. Reasons for this are that the capital city, which has the highest use rate, is in the Southwest Region. Other contributors include the standard of living and the level of economic activity of the population.

A positive trend is registered in the use of Internet by elder people aged between 55 and 64 years, which increases year on year. For example, in 2009, 16,4% of elder people used Internet services whereas in 2015 their share increased to 37,6%. Between 2004 and 2014 the highest use rate is registered in the Southwest Region, the disparity between the regions decreasing year on year and data for 2015 showing a top performing North Central Region in terms of Internet uptake by people aged over 55 (48,7%), followed by the Southwest Region (46,1%). The lowest Internet uptake by elder people in 2015 is registered in the Northwest



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Region (29,4%) and the South-Central Region (29,7%). On average, 22,2% of women and 21,8% of men aged 55-74 years use Internet at least once a week which means that there is little difference in Internet uptake between women and men.

Internet uptake by elder people in Bulgaria increases, but the share of elder people using the World Wide Web remains low compared to the other EU Member States. Eurostat data (**Eurostat, Individuals - computer use, 2015**) show that on average 59% of the population aged between 55 and 74 years in all Member States use the Internet whereas in Bulgaria only 27% do so. Besides, Bulgaria registers even lower rates on frequency of use - 12% for Bulgaria against 46% for the EU use Internet at least once a week (**Eurostat, Individuals - frequency of computer use, 2015**). The low level of use by elder people could be attributed to absence of technologies at home – only 18% of persons aged between 55 and 74 years report using a computer at home (**Eurostat, Individuals - places of computer use, 2011**).

Internet and mobile technologies come in strong in people's life, implying urgent need to make them also part of the life of elder people. The access of elder people to information will be thus notably improved and there will be a positive effect on their life.

There are many examples of Internet-based technologies which notably facilitate the life of elder people, including by improving the monitoring of their condition, their contacts with relatives and friends, identifying their emotions, etc.

Participation in decision-making processes

Political participation of elder people

Recent national elections in Bulgaria show decreasing voter turnout for most age groups. Political participation by elder people is an important element of their involvement in the social life of their local community. In Bulgaria, but also in Europe in general, the active participation of people aged over 55 years in political and social life contributes to their higher involvement in the participatory democracy processes and enables them to take more active part in them. Besides, the experience of elder people who have lived through different historic periods and political regimes, could be very important. Sharing this experience with younger people within informal organisations should be thus viewed as a positive element of their intercommunication. Such forms could include commitment to the work of different non-governmental organisations, different forms of volunteering, participation in different public discussions and debates, etc.

The survey “Quality of Life” 2012 examines the extent to which citizens engage in participatory democracy and the extent to which they believe that political decision-making can be influenced through their own actions and through those of different non-governmental organisations.



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The main survey results show that the work of non-governmental organisations influences local and national policies – 75% of respondents think so, whereas only a minority of respondents believe that non-governmental organisations can influence decision-making at EU level. However, in five Member States – Romania, Greece, Bulgaria, Portugal and Cyprus, people think that European citizens do not need NGOs.

Data show that about 7 in 10 respondents think that voting in local and national elections is an effective way to influence political decisions. It is notable that voting in local elections is viewed as the most effective way of influencing political decision-making. The citizens in all countries, with the exception of Slovenia, think that voting in national elections is also effective in this regard, though to a lesser extent.

The survey shows that signing a petition is a very popular form of citizen engagement. On average for all EU Member States, 34% say they have signed a petition, the proportion varying from 7% in Cyprus to 53% in the UK.

Participation in society

Data for Bulgaria show that almost half of the respondents – 49%, say NGOs are not needed, whereas 42% think they are useful and have an important role in society. People aged over 55 years are also most likely to agree that European citizens do not need these types of organisations. Reasons are that non-governmental organisations rarely work on themes and issues which have direct relevance for elder people. Diversifying the activity of non-governmental organisations and focusing it on the problems of elder people is an important factor for increasing the trust in such organisations and for creating a better environment for active ageing.

The share of elder people who are members of trade unions, political parties or groups is low and almost equals the national average.

Similar are also the data about participation in protests and demonstrations. Elder people aged between 50 and 64 years participate in protests and demonstration to a greater extent compared to people aged over 64. However, activity at national level is generally low (less than 2%).

Support for informal caregivers

Intergenerational solidarity in an ageing society calls for creating conditions which enable elder people to retain more independence that will allow them to take better care of their life and contribute to society and thus be able to live a decent life as fully-fledged members of society. Intergenerational distribution of resources and opportunities in a balanced way is thus necessary.





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In the Bulgarian context, there are still few practices for provision of professional support and training to informal caregivers. There is lack of practices and forms of providing recreation and adequate social protection with a view to preventing the social exclusion of people providing care.

Reasons **lay in** the absence of non-traditional and flexible social services that can be of help to informal caregivers, in particular to those who provide care for a longer period.

There is also absence of official ways of enabling informal caregivers to receive training or to develop the skills they need.

A number of surveys show that care to children and elderly people puts further stress on workers and prevents them from having proper rest. Therefore, it is very important to create additional systems in support of families in order to reduce the risks of longer stress and engagement and allow working people more time for rest and recreation. Elder people's support in the raising of their grandchildren or in the care for other elderly people or sick relatives is obviously an important resource in this respect. Equally, such systems would support also elder informal caregivers, who attend to their relatives, and would ensure support and rest, as well as opportunities for leading a full-fledged life and for entertainment in such periods.

1.3. Analysis of specific national and regional challenges and opportunities for promoting active ageing in the independent living domain

Health promotion and disease prevention

Health condition, health status of the population

World Bank data used in the report “World Bank 2013. Bulgaria Health Sector Diagnosis Policy Note” show that the health status in Bulgaria improves over time but the country lags behind most of the EU Member States on the key health status indicators. The average life expectancy at birth is 73 years for Bulgarians against 80 years for EU 27 and 75 years for the new Member States (NMS). The mortality rate for circulatory diseases for the population below 64, which was 143 per 100,000 in 2009, is 46% higher than the average of NMS. Heart attacks, heart failures, and strokes jointly make up more than 65% of all reported causes of death. Cancer is the next major cause of death in Bulgaria, with cancer death rates (172 per 100,000) similar to the EU -27 (173 per 100,000) and better than NMS on average (199 per 100,000).

Lifestyle factors such as smoking, poor diet and psychological stress are thought to explain much of the gap between chronic disease rates in NMS compared to the EU-15. **Smoking is a key risk factor for the cardio-vascular diseases and cancer.** Standardised death rates from smoking-related causes are higher in Bulgaria compared to the EU-12, due to the high



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prevalence of smoking, which at around 40% is the second highest in the EU. Bulgaria also has the second highest number of people who smoke every day (31%).

Data for Bulgaria show that respondents aged over 65 years consider themselves to be in “fair” health – about 45,4% of respondents. One fifth or about 20,4% believe their health to be “poor”. By contrast to the other age groups (15-24; 25-44; 45-64), this age group is least satisfied with their health: only 1,5% think their health status is very good. This fact is confirmed by the comparatively high percentage of people aged over 65 who report having long-standing illness – 86,5 %.

In terms of family doctor utilisation, this age group registers the highest frequency of visits to the family doctor in the past 12 months – 88,5%, but rarely consulted a dentist. A similar percentage of respondents report controlling their blood pressure – 87,3%, blood sugar – 71,2% and blood cholesterol - almost 69,9%, in the last 12 months. This means that care for one’s dental health is side-lined by contrast to the visits to the family doctor.

The share of elder people reporting unmet needs of health and dental care decreases (from 30% on average in 2006 to about 20% in 2013) but remains high compared to the other EU Member States.

In terms of lifestyle and health determinants such as smoking, alcohol consumption and body mass index, elder people aged above 65 years are overweight to a greater extent than the average. However, at the same time the share of smokers among elder people decreases significantly as a result of different health conditions and awareness of the negative effects of smoking. However, prophylaxis and prevention of different illnesses need to be enhanced. One of the most common factors increasing the share of different long-term illnesses include lack of physical exercise, poor diet and alcohol consumption. Building a network of organisations and initiatives to address the above issues and promote health care would have a positive effect at the local level in respect of the health status of elder people.

Data for unmet needs of medical examination and treatment of the different age groups over 55 years show that the number of people who do not have unmet needs increases in the past 4 years after 2010 in all age groups (55-64; 65-74; 75-84 and 85+).

As people grow elder the share of those in good mental health decreases. People with higher educational attainment tend to a greater extent to preserve their mental health despite their old age.

The share of people having physical and eye limitations also increases in old age. High disparities are registered again depending on education – in the age group 65-74 the difference between primary and tertiary education is more than 20 percentage points: 52%





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of the people with primary education aged 65-74 have limited physical and eye functions against 30% of those with tertiary education in the same age group.

Differences by gender show that age and education being equal, women to a greater extent manage to preserve their physical and eye functions. Reasons are the better prophylaxis among women as well as the different types of work they do.

More noticeable difficulty in doing household activities is registered after 75 years - 42% of this group report having difficulties. Additional support and social services intended for those groups are thus needed. Men have greater difficulties, but it is notable that in the group with low educational attainment there is almost no difference between women and men whereas among elder people with secondary and tertiary education the share of women experiencing activity restriction in doing household activities is smaller than that of men.

Healthy Life Years

There is no significant change in the Healthy Life Years indicator over the past few years. Higher values are registered for women compared to men because life expectancy is higher for women. Healthy Life Years for men aged 50 are 18 years whereas for the women of the same age they are almost 21 years. The values for the people aged 65 are respectively 9,9 years for women and 8,7 for men. There has been no change in the trend in recent years.

The share of Healthy Life Years in the remaining life expectancy shows the same trend. Women live greater part of their life in good health compared to men. In recent years, the share of healthy life years in the remaining life expectancy tends to decrease slightly. Reasons can be different, but they are related on one part to the higher life expectancy and, on the other part, to the increasing share of long-standing illnesses.

Adequate housing conditions and services

The housing conditions and services also have an important role in the analysis of the lifestyle of elder people. By contrast to the practice in most European countries of adapting housing to the needs of the elder population, elder Bulgarians do not have basic amenities in their homes. Despite the positive trends in recent years, one fifth and one fourth of elder Bulgarians aged over 65 and living alone do not have indoor flushing toilet. The share of elder people whose home is not in good condition in this age group is also high and the problem is felt more among women.

Over the last few years, the housing conditions in the country tend to improve, including those of households with elder people. It has been noted that elder women living alone have poorer living conditions than elder men living alone. Reasons are in the different financial status, which was commented earlier in this analysis, as well as in the different capacity to



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address housing problems. The proportion of elder women living alone in homes with leaking roofs, damp walls and floors, or rot in window frames is almost 5 percentage points higher compared to elder men of the same age living alone.

It can be said that elder people live in overcrowded accommodation to a lesser extent compared to the other population groups and the share of elder people living in overcrowded dwellings systematically registers a downward trend over the last few years.

Similar is the trend in respect of other housing characteristics such as having indoor flushing toilet. The share of households not having indoor flushing toilet decreases but elder people (aged over 65) remain most vulnerable on this indicator. Notable is the fact that elder men living alone lack indoor flushing toilet to a greater extent compared to elder women living alone, the difference between the two sexes being within 5 percentage points but the values converge over the past few years.

Accessible transport

Most of the bigger Bulgarian municipalities experience a process of renovation and modernisation of public transport. At the same time, a number of smaller municipalities lack funds and are substantially behind in procuring modern transport adapted to the needs of elder people. In large part, elder Bulgarians are not mobile and limit their trips and moves within the country. Bulgaria is lagging behind in adapting the transport infrastructure to the needs of persons with disabilities and reduced mobility to make it accessible, safe and secure for elder people with a view to reaffirming their independence and enabling them to participate actively in society.

The proportion of Bulgarians aged 50-64 who experience difficulties in accessing public transport is about 21%, increasing to 27% among people aged over 64. Limited access is the result of reduced frequency of urban and interurban transport lines as well as of difficulties in accessing vehicles and of their overall condition which is not always favourable for elder people.

Active ageing enabling environment, goods and services

Most marketing strategies and campaigns disregard elder people as consumers. Reasons lie in the more limited consumption and more limited disposable income of the greater part of elder people in Bulgaria. Few products and services are targeted at elder consumers. In the Bulgarian context, the number of companies giving regard to the preferences and needs of elder people and designing or importing products targeted at this age group is very small. People above 50 are rarely covered by advertising campaigns. An additional argument in that direction is their stronger saving attitude for fear of future unfavourable events or because of specific needs, including needs related to health and treatment. Despite those



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trends, some commercial chains encourage and facilitate shopping by elder people through specially targeted campaigns and price reduction in non-active hours, with cheaper products having specific characteristics which meet the needs of elder people (for example, mobile telephones with bigger buttons and figures, comfortable clothes and shoes for elder age, etc.). However, marketing specialists fail to take into account the fact that the profile and structure of Bulgarian pensioners is changing. The new pensioner cohorts are entered by more solvent and more active elder people whose lifestyle is much closer to that of the other population groups (45-55 years). Equally, as the result of pension system reforms and improved labour market participation, some of those groups are solvent, have good investments and thus greater opportunities for good standard of living, more active consumption, travel etc. Companies and commercial networks will thus most likely increase their interest in those groups in the years to come and will focus their efforts on utilising this untapped potential.

Maximum autonomy in long-term care

The Third European Demography Forum points to the need to provide more opportunities for elder people to contribute to society and to have greater autonomy and independence. At the same time, a number of conditions prevent elder people from doing basic household activities.

A number of social services aimed at supporting social inclusion and reducing poverty, as well as at addressing the exclusion of elder people have been designed in support of this population. Despite that, existing services are insufficient, unevenly distributed across the country and do not meet existing needs in an adequate manner. One significant problem is that the majority of the services are financed within projects, mainly with European funds, and their sustainability and affordability after project completion is thus questioned. The national co-financing is not sufficient and does not create opportunities for meeting needs better.

Existing social services are institutional and community-based, the latter tending to increase. They are characterised by different levels of development, different providers (municipalities and NGOs), are developed unevenly across the country, often concentrated in towns and to a lesser extent in villages, the access to them thus being different and the provision of equal opportunities and equal access remaining as a challenge. Most experts point out that there is still lack of standards guaranteeing the quality of social services, the methodological guidelines and the material resources are obsolete and make it difficult to achieve good standard of living and meet the requirements of those in need in an adequate way.





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1.4. Opportunities for making use of elder people’s potential, capacity building and creating active ageing enabling environment at national level and at NUTS 2 level

Potential for promoting active ageing in the different policy areas

None of the domains covered by the analysis can undergo rapid changes if such changes are not catalysed by institutional measures. The changes in the key characteristics, lifestyle and models of elder people are visible. They will continue at the natural pace of demographic development. However, active ageing can only be promoted by setting examples and models from the earliest age: healthy food, doing sport, participation in social life and commitment to social and political matters. Changing the lifestyle of the younger generations will have a favourable effect on their lifestyle and attitudes in higher age. At the same time, a very important result of the Active Ageing Index analysis is that in the high-scoring countries there is greater life satisfaction. There is strong correlation between the values of the Active Ageing Index and life satisfaction.

The economic factors influencing active ageing and their correlation with the main index domains are discussed within the analysis. The data show medium correlation between GDP per capita and the aggregate active ageing index score. Results to date show that Bulgaria is among the low-scoring countries on the Active Ageing Index, although it is not in the last place.

Capacity for active ageing

The main aspects of the capacity for active ageing are the result of the health, educational and social status of elder people. Overall, the capacity for active ageing can be assessed as good. That is due mainly to the higher level of educational attainment and to the fact that it increases systematically. There are a few areas that need improvement and efforts to increase the capacity for active ageing:

- The health status of the population needs improvement, as well as the related mental health, dental care and general physical activity.
- There is a need to enhance the social activity of elder people and their participation in social life, cultural events (concerts, theatres, movies) and other creative activities.
- Improving the standard of living and the opportunities for enhancement of the housing conditions of elder people is an important element of improving the capacity for active ageing.
- In order to improve the social connectedness and the awareness of elder people, it is important to increase their access to ICT and the uptake of technologies at home.



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- The educational attainment of elder people is currently good, but the continuing upward trend should be monitored; it would be good to develop different forms of lifelong learning which would improve the adaptability and the qualification of elder people in accordance with labour market needs.
- In order to enhance the activity of elder people, including their physical mobility, it is important to improve their access to transport services, gradually addressing the poor transport connectivity of small towns and villages and the poor physical accessibility of most vehicles.
- Employment of elder people (over 55 years) increases in recent years, but more flexible, age-appropriate forms of employment still need to be developed. That would be of paramount importance for preserving and transferring the experience of elder people and enhancing the capacity of organisations. The joint teams of younger and elder workers and employees yield very good practical results in the actual production process.
- In order to improve the inclusion of elder people in social life and achieve synergies in different social spheres, it is important to encourage volunteering among elder people. Appropriate volunteering forms and initiatives need thus to be created.
- It is necessary to create more forms for social inclusion of elder people and the community cultural centres could be the central resource in this respect because in terms of coverage and as a model they provide unique opportunities for targeted work with elder people.
- The independent living of elder people should be given greater encouragement, including by implementing technologies and specific domestic services targeting the changing age-related needs.





2. ANALYSIS OF THE STRENGTHS AND WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT)

The following strengths and weaknesses, opportunities and threats can be outlined on the basis of the analysis of active ageing in Bulgaria:

Strengths	Weaknesses
<ul style="list-style-type: none">• Increasing average life expectancy• Increasing share of people with tertiary education in the age groups over 55 years• High share of life years in good health in the remaining life expectancy• Good social connectedness and communications with family, relatives and friends• Existing network of community cultural centres which is favourable for developing activities for elder people/seniors at local level• Existing amateur troupes and creativity groups in which elder people participate	<ul style="list-style-type: none">• Low standard of living and high poverty level, especially among some of the pensioners/retired people• Poor access to ICT and low share of seniors using ICT• Low share of elders participating in different forms of lifelong learning• Poor motivation of seniors to participate in decision-making processes• Elder do not have adequate access to transportation (low transport connectivity of small towns and villages and poor physical accessibility of most vehicles)• Low employment rate of elder people (over 55 years)• Low level of volunteering and participation in society• Low level of participation in cultural events and low attendance to concert, theatre, movie.• Low level of physical exercises and of doing sport





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	<ul style="list-style-type: none">• High share of Bulgarians aged over 55 years with unmet needs of health and dental care• Poor opportunities for independent living for elder persons
Opportunities	Threats /risks/
<ul style="list-style-type: none">• Need of qualified specialists and increasing labour market demand• Preserving the cultural traditions and the cultural institutions and community cultural centres at the local level, using the capacity of elder people• Using the capacity of NGOs to develop activities targeted at elder people and with the active involvement of elder people themselves (persons aged over 55 years)• Development of volunteering for and among seniors• Developing amateur troupes, local history activities and creativity groups to preserve the local cultural traditions and habits• Encouraging the business to adapt workplaces to elder people and to make efforts to preserve experience through joint teams of young and elder workers and employees• Local capacity building and improving the social services	<ul style="list-style-type: none">• Deteriorated economic environment• The economic activity is concentrated in a couple of big cities across the country• More difficult access to health and social services in the small towns and villages, especially in the small villages in the underdeveloped regions of the country• Unbalanced territorial distribution and disparities in terms of the quality of social services; particularly affected are remote towns and the villages• Lower security and existing risk of criminal acts against elder people and their property• Age discrimination in the society and in the labour market• Poor conditions and inadequate maintenance of existing infrastructure (transport, water, ICT, healthcare, education, etc.)





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targeted at elder people;

- Improving and diversifying the services and products for elder people

3. VISION, VALUES, PRINCIPLES

The design of the National Comprehensive Strategy for Active Ageing takes into account the existing national demographic strategic framework: the Updated National Demographic Strategy of the Republic of Bulgaria (2012-2030) and the National Concept for Promotion of Active Ageing (2012-2030). The National Concept for Promotion of Active Ageing integrates information about major spheres of the policy for promotion of active ageing. It builds on the conclusions and recommendations of the analysis as well as on the achievements of the European Year of Active Ageing and Solidarity between Generations (2012), the priority pillars of the European „Guiding Principles for Active Ageing and Solidarity between Generations” and the conclusions from the stakeholders consultations within the regional round tables.

3.1. Vision

Elder people are an important and valuable resource of Bulgaria. They have the right to lead a worthy life and full-fledged participation in social activities, to good health and productive life to develop their knowledge, skills and abilities, to equal treatment and protection of their fundamental rights.

With the National Comprehensive Strategy for Active Ageing, the Republic of Bulgaria aims to create conditions for economic growth, sustainable social systems development, improved standard of living and quality of life and cohesive society.

All Bulgarian citizens enjoy all rights and freedoms proclaimed by the Constitution of the Republic of Bulgaria, the national laws and the international treaties in the field of human rights to which the Republic of Bulgaria is a party. Equality is effectively achieved by applying the respective laws without distinction on grounds of age, sex, race, ethnic origin, language, religion, education, beliefs, political affiliation, income, personal or social status.

The policy to support active ageing is part of the national demographic policy and of the comprehensive policy for sustainable cultural, economic and social development of Bulgaria. Sustainable development is a means for ensuring the wellbeing of Bulgarian citizens – those living today and the future generations. Sustainable development is guaranteed by managing the population, the resources and the environment in a reasonable and balanced way.



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The National Comprehensive Strategy for Active Ageing offers a clear perspective for addressing the consequences of ageing in the context of an integrated approach reflecting the specifics of ageing.

The demographic trends in the EU Member States have common characteristics, but the current situation in Bulgaria has its specifics. Some of the elder Member States have low birth and death rates and high average life expectancy. The situation in Bulgaria reveals lower life expectancy and higher death rate. The data on the average number of life expectancy in good health is also unfavourable. In Bulgaria, ageing occurs against the background of a sustainable long-term trend of negative population growth with the deaths significantly exceeding births. The meaningful parameters for development of the National Comprehensive Strategy for Active Ageing have thus to take into account the actual condition of elder population so that the actions planned match identified needs as much as possible. **Special focus needs to be placed on promoting healthy life, improving health services and improving and diversifying the social services for seniors.**

The families of elder people have a key role in improving their standard of living and the quality of life elder. European Commission research shows that a significant portion of elder people prefer to live independently in their own home or with their closest relatives. **Improving the conditions for providing care to elder people in a domestic or near-domestic environment is thus becoming an important prerequisite for taking steps to reconcile family and working life.**

It is also very important to relate the policy response to ageing to the comprehensive social development process. The National Comprehensive Strategy for Active Ageing takes into account the need to provide development opportunities and perspectives during **a longer period than human lifetime and into a broader social context.**

Active ageing has characteristics which go beyond the economic context. Active human existence needs to be understood and related not only to the employment domain although the latter has a key role for the quality of people's lives. Along with employment, making independent personal choice is one of the most important conditions for exercising the individual rights and freedoms of elder people.

Active ageing is linked to key social concepts such as participation in society, , volunteering, good health status, labour and social mobility, financial security, opportunities for lifelong learning, sustainable and flexible employment, gradual transition to retirement, flexible retirement arrangements, employment during retirement age, health prevention with a focus on prevention of incapacitation, affordable long-term care, free and autonomous activity even in old age.





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Active ageing outlines a process which should be considered in an individual as well as in an institutional perspective.

The factors that have an impact on active ageing can be classified into **general** and **specific**.

Equality issues stand out among the general factors which have relevance to the consolidation of active ageing programmes and are met in many EU Member States, followed by **the financial effect of ageing** and the **institutional arrangement** of the policy for elder people. Equality issues tackle age discrimination; the financial dimension of ageing puts the social security and social protection systems to test and the institutional arrangement of the policy for elder people is often characterised as “fragmented”.

Age discrimination is reported in almost all spheres of social life. In the labour market, elder people are under strong pressure to leave the labour force. There is evidence that elder people are ignored in the delivery of trainings, on one part, and, on the other part, their physical and mental needs are neglected. Beyond the labour market, the opinion about elder people and ageing in general is wrong and erroneous. By contrast to young people who are economically, culturally and politically associated with dynamism and innovation, elder people are unjustifiably associated with conservatism and stagnation.

With regards to the financial dimension of ageing, it should be noted that the nature of the demographic imbalance between generations is concentrated in a noticeable change of the socioeconomic as well as of the sociocultural context of the active social policy. Changes affect the labour market and the traditional family values and structures alike.

The institutional fragmentation of the policy addressing elder people consists in taking piecemeal and unsustainable actions; thematic operational fragmentation of ageing problems; absence of adequate explanatory information, lack of coherence, coordination, consistency and consolidation of actions.

In order to achieve sustainable development and economic growth, it is vital that Bulgaria should discover new reserves, untapped resources and unleash the potential of all social groups. A couple of related/integrated policy domains are particularly important for promoting active ageing:

- **Balancing between professional and family life**, especially with regards to women: creating conditions and opportunities for people who provide care to a dependent family member to receive reliable support from the State in order to be able to participate actively and efficiently on the labour market, i.e. the quality and professionalization of the family services for care to children and dependent family members need to be developed;





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- **Promoting active ageing in good health**, so that the knowledge, skills and potential of elder people are used longer in the labour market thus enabling those people to contribute to economic growth; improving the working conditions and enhancing preventive health care; building intergenerational solidarity; lifelong learning and uptake of new information technologies; overcoming the negative stereotypes about the public image and preventing discrimination of elder people in the labour market;
- **Developing long-term care and volunteering, given the fast pace of population ageing.**

Along with ensuring adequate conditions in the employment domain, actions should be healthcare- oriented, with a focus on prevention of major diseases and on preventive care, as well as on boosting a positive image of elder people in the public space.

The longer stay in the labour market and the economically active behaviour of elder people should be accompanied by adapting the education and qualification system to their elder requirements, providing adequate incentives, creating conditions for overcoming age discrimination and taking account of the importance of elder people’s experience.

Along with that, there is a need to take action to guarantee decent and healthy ageing, develop measures for prevention of illnesses and disabilities and for promotion of healthy lifestyle, develop services for elder people and give new interpretation to the positive social role of elder people as full active citizens.

Due regard should be given also to the role of the non-governmental sector and the social partners in this process.

Authoritative European analytical centres continue to analyse and project the population ageing processes. The work along those lines, while also looking for new approaches, will certainly lead to changes and improvements in the European and national strategic documents addressing population ageing.

The report: Analysing Population Aging from a New Perspective¹² of the International Institute for Applied Systems Analysis (IIASA), Austria and Wittgenstein Centre for Demography and Global Human Capital at the Austrian Academy of Science, Vienna, points out that population ageing is a major force reshaping economies and societies. New-characteristic-based measures, developed at IIASA, provide a more accurate assessment of the challenges of population ageing and the effects of policies for tackling those challenges.

¹² www.iiasa.ac.at





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Population ageing changes economies and societies and it has thus prompted many international policy discussions which generally take place using concepts that are over a century old: this is the “first-generation” approach to ageing.

A distinguishing feature of this approach is that people are categorized as “old” or as “old-age dependents” when they reach some fixed chronological age, usually 60 or 65. An early statement of the UN, which uses this approach, can be found in the *International Action Plan on Ageing* (1982):

“In 1950, according to United Nations estimates, there were approximately 200 million persons 60 years of age and over throughout the world. By 1975, their number had increased to 350 million. United Nations projections to the year 2000 indicate that the number will increase to 590 million, [...]”

A more recent UN publication, the World Population Ageing 2015 report states that: “[...] the number of elder persons – those aged 60 years or over – has increased substantially in recent years in most countries and regions, and that growth is projected to accelerate in the coming decades.

Between 2015 and 2030, the number of people in the world aged 60 years or over is projected to grow by 56 per cent, from 901 million to 1,4 billion, and by 2050, the global population of elder persons is projected to more than double its size in 2015, reaching nearly 2,1 billion.

Although the numbers are different, the approach is the same in 2015 as it was over three decades earlier. People are still being classified as “old” at age of 60.

This first-generation approach is problematic because the study of population ageing should not be based only on chronological age, but on how well people function in society.

There are people over the age of 100 who participate in sanctioned track and field competitions, and those over 70 who climb Mount Everest. In the USA in 1994, 26,8% of men aged 65-69 participated in the labour force. By 2024, that percentage is forecasted to rise to 40%.

Over time, the characteristics of people at each age change. In many places, 60 year olds in 2050 are likely to be much more educated, healthier, have better physical and cognitive functioning, and have a longer remaining life expectancy than 60 year olds living in the same area had in 1950. Why, then, should policymakers treat them as being equally old, an equal burden on the pension system, and equally in need of care? When the characteristics of people change over time or differ in space, the first-generation measures produce misleading figures, and therefore suboptimal policies.





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One of the most commonly used measures of population ageing is the change in the “old-age dependency ratio”. This ratio relates the number of “old-age dependents”, who are assumed to be everyone 65+ years old, to those assumed to support them, people from 20-64. Many people are not getting the message that they are supposed to become “old-age dependents” on their 65th birthdays. Nevertheless, that message is unfortunately the basis of much of the policy discussion concerning population aging: **a new approach is needed.**

Defining age based on people’s characteristics is a better approach

The “second-generation” approach, based on characteristic-equivalent ages, produces new insights about differences between locations and over time.

Ageing is a multidimensional phenomenon. The new approach is based on analysis of people’s characteristics such as life expectancy, health and morbidity, disability, mortality rates, labour participation, and healthcare spending. For example, in 2015, Japanese women aged 65 had a remaining life expectancy of around 24 years. In 1955, they had the same remaining life expectancy at around age 50. Nigerian women in 2015 had that remaining life expectancy at age 46.

Therefore, 65-year-old Japanese women in 2015, 50-year-old-Japanese women in 1955, and 46-year-old Nigerian women in 2015 would have the same life expectancy-based age because they had the same number of years of life ahead of them. The concept of characteristic-equivalent ages lies at the heart of the second-generation approach.

Rethinking the definition of “old age” is key to understanding 21st century population ageing

Categorising people as old based on a fixed chronological age is inappropriate both from a social and an economic perspective. How old is “old” and what does it imply? IASA experts recommend a simple alternative to using 65 as the threshold of old age.

Given the substantial variations in health and longevity, a better approach is to categorize people as “old” when they are getting close to the end of their lives. A 61-year-old Japanese and a 54-year-old Nigerian woman had a remaining life expectancy of 15 years in 1950, so, using the second-generation methodology, the threshold of old age in 1950 would be 61 in Japan and 54 in Nigeria. Old-age thresholds need to change over time and space according to the characteristics of people.

Accurate measures of population ageing help tackle the challenges of demographic change

New and more accurate measures of aging can better inform demographic analysis and the public policy discussion.

Recently, new measures of population ageing have been published, showing forecasts of:



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1. The ratio of adults who are not in the labour force to those who are.
2. A new measure of the burden of healthcare costs that takes into account the fact that most of the healthcare spending on the elderly comes in the last few years of their lives.
3. A new measure of the burden of public pensions that takes into account the upward trend in full pension ages.
4. A measure of the ratio of adults who are old, according to the IASA definition, to those who are not. These new measures, available at www.reaging.org/indicators, present a very different picture of population ageing than the first-generation measure. For example, the total dependency ration, the ratio of those 0 – 19 and 65+ years old to those 20-64, is often used to portray the change in the burden of an increased number of non-working people on those who are working. This first-generation measure ignores likely changes in labour force participation rates. Using predictions of labour force participation rates from the International Labour Organisation, the ratio of people who are not working to those who are is forecasted. In Germany, the first-generation measure increased by 31% from 2015 to 2030 but the more accurate second-generation measure increases by only 11%. In Hungary, the first-generation measure increases by 14% over the period, while the new measure decreases by 1%.

Intergenerationally fair normal pension age for a sustainable future

Taking changes in life expectancy into account ensures a balance of pension contributions and receipts for generations to come.

In most wealthy countries, state pension arrangements are changing. Full pension ages are rising or changes which have a similar effect are being made in pension eligibility requirements. Pension arrangements differ by country. However, the characteristics approach can be used to compute an intergenerationally equitable normal pension age (IENPA)¹³ that takes changes in life expectancy into account.

This is the age that ensures that the balance of pension contributions and receipts is the same for each successive generation. It can serve as a standard against which to compare the paths of legislated future changes in full pension ages. In many countries, pension ages are planned to rise at about the same speed as the IENPA. This statistic helps policymakers see which counties have normal pension ages which are changing more rapidly or less rapidly than would be intergenerationally fair. Pension systems based on IENPA are more sustainable than those that keep normal pension ages fixed.

¹³ Intergenerationally equitable normal pension age (IENPA),





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Beginning with a normal pension age of 65, the IENPA in Germany rises to 67 in 2029. According to German law, the normal pension age will also increase to 67 by 2029, so the legislated increase in the German normal pension age and the increase in the IENPA are identical to 2029. Further increases in life expectancy of the elderly results in an IENPA of 69 in 2050. This information can be used in policy discussions about what the normal pension age should be after 2029. Having knowledge of the level and dynamics of an IENPA in a country can provide policymakers with a clear standard against which to assess existing policies and formulate new ones.

A mix of increased pension ages and labour force participation rates will be best

Removing barriers for people who would like to work and creating incentives for people to stay in the labour force will help decrease the pension burden. Increases in normal pension ages can be reduced without increasing the burden on working adults by increasing labour force participation rates. This can be a win-win policy because public policies sometimes keep some who want to work from doing so. Reducing these barriers can increase the wellbeing of those who want to work and simultaneously allow legal pension ages to rise more slowly. In many counties within the Organisation for Economic Cooperation and Development, an increase in the average labour force participation rate of 20-64 year olds by 1 to 2 percentage points is all that is needed to enable policymakers to reduce the increase of the normal pension age by one year without increasing the burden of supporting the non-working population.

In studies of population ageing people should not be categorized as “old” at age of 60 or 65. Measures that do not take changing characteristics into account mislead policymakers. **In particular, new policies on ageing should incorporate some key aspects:**

1. Categorise people as „old” when their remaining life expectancy is 15 years or less.
2. People with equivalent characteristics (such as life expectancy) should be treated as having the same characteristic-based age.
3. Conventional measures of population ageing, based on fixed ages, should be retired. Alternative measures that incorporate changing characteristics are available at www.reaging.org/indicators, Table Re-Aging 3.
4. Planned policy changes in normal pension ages should be compared with intergenerationally fair normal pension ages.
5. Policies should make it easier for elder people who wish to work to do so.





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3.2. Values

Population ageing is often seen in negative terms although elder people are key human capital for social and economic development, a generator and a source of experience and knowledge. Elder people give valuable support to the society and the family by caring for dependent persons, passing on their professional experience to the younger generations and contributing to life support and social relations.

The values underpinning the Strategy are:

Independent living

Elder people should be independent, with access to good living conditions and physical environment, adequate income, safe community environment to live in, including not being subjected to crime, having access to reliable and usable information.

Participation in society

Elder people should be able to take active part in all aspects of social life: participation in society and opportunity for volunteering as a means to tackle exclusion and lonely life, active citizenship and participation in the decision-making processes.

Access to care

Support and encourage the health and good status of people as they grow elder: elderly people should have access to adequate healthcare and social services adapted to their individual needs, including care at home for those with permanent disabilities.

Dignity

Ensure that elder people lead a decent life in a secure environment and are not exploited with physical and mental aggression; protecting their human rights, their right to equality, protect them against age discrimination in the society, taking into account the challenges they are faced with due to prejudices based on disability, sexual orientation, age, gender.

3.3. Principles

The National Comprehensive Strategy for Active Ageing is guided by the following basic principles:

- ❖ **Legality** – aligning the objectives, priorities, measures and specific actions with the Constitution of the Republic of Bulgaria, the laws and other legislative instruments, proper and uniform application of the law to all;





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- ❖ **Preventive action** – planning measures and actions to address and/or limit the effect of factors which have a negative effect on demographic development and population ageing;
- ❖ **Continuity** – prevent suspension of the strategy with changes of government, for political or for other reasons;
- ❖ **Equality** – there should be no excluded or privileged population groups;
- ❖ **Following the whole human lifecycle– taking into account the peculiarities and the specific needs characteristic of each one of the three major phases of the human lifecycle (youth, working age and retirement age).** Each one of the age groups has its place and plays its role in the socio-economic and in intergenerational relations.
- ❖ **Effectiveness** – achieving optimal, cost-effective results;
- ❖ **Efficiency** – adequacy of the objectives and priorities set, the measures, specific programmes and expected results set to actual needs;
- ❖ **Coherence** – ensuring coordination, interrelatedness and synergism of the effects of the specific demographic policies;
- ❖ **Public-private partnership** – active and coordinated participation of authorities, citizens and the business in the implementation of the demographic policy for active ageing;
- ❖ **Transparency and monitoring of implementation;**
- ❖ **Sustainability of results** – ensuring lasting long-term effect of results;
- ❖ **Mainstreaming of Aging Policies¹⁴** – implementing a comprehensive approach to population ageing in all sectors, encouraging the participation of elder people, associations thereof and of non-governmental organisations in the definition of active ageing measures and programmes; participation of local authorities in the implementation of policies for promotion of active ageing;
- ❖ **Participation of local authorities** in the government policy on population ageing;
- ❖ **Public and political consensus on pursuing thereof.**
- **Innovation** – placing the focus on the development of innovative and integrated services, reference to and actual implementation of good practices and models in the service planning and provision processes;

¹⁴ Integrating the ageing policies in all related policies





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- **Cross-sector interaction** in implementing measures and providing social, educational and health services tailored to the specific necessities and needs of elder users;
- **Citizen participation and dialogue** – involvement and interaction of all stakeholders in the design and implementation of the active ageing policy.

4. OBJECTIVES OF THE STRATEGY

The strategic goal of the strategy is to create conditions for active and worthy life of elder people by providing equal opportunities for their full-fledged participation in economic and social life.

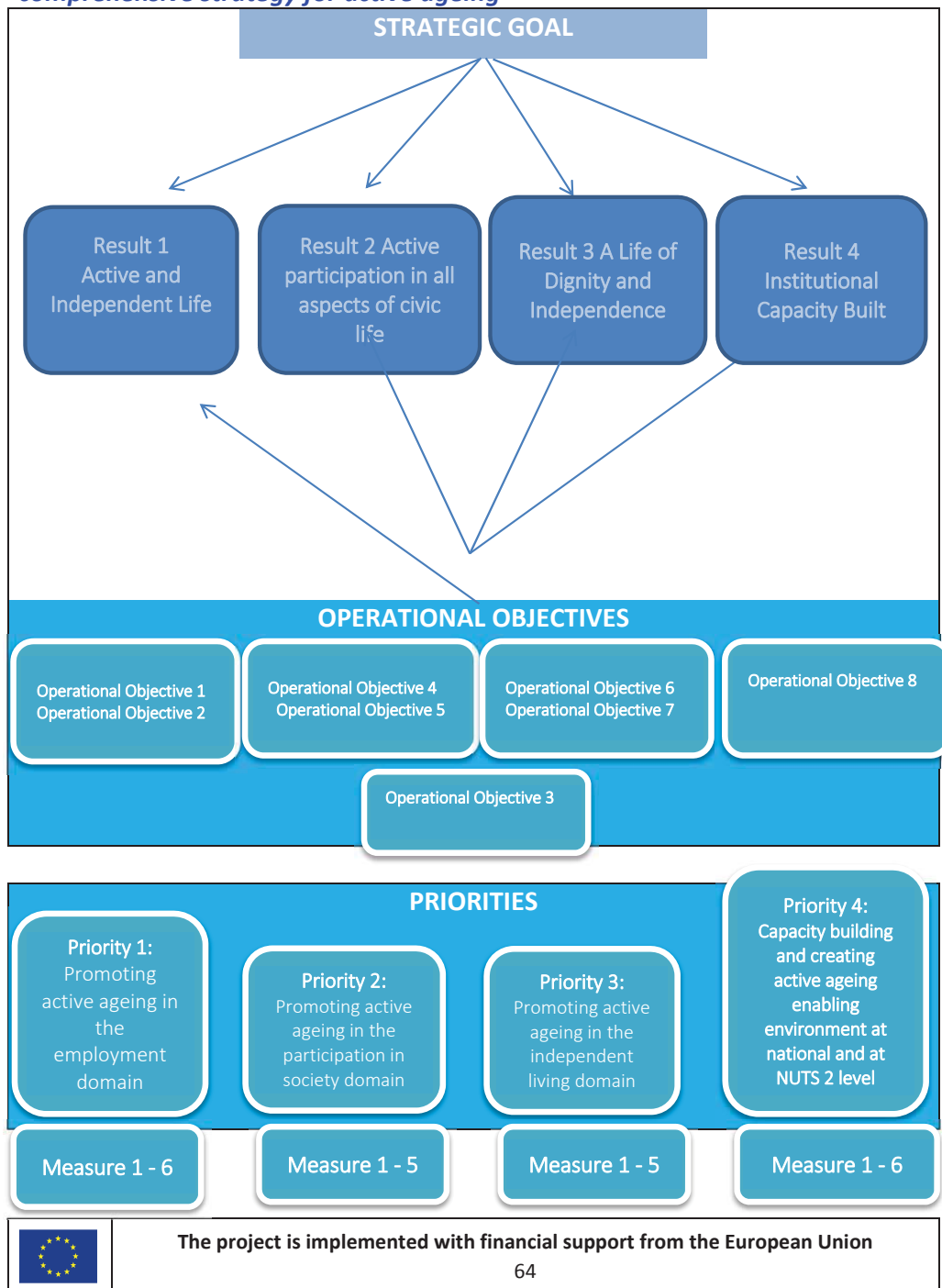
Ensuring that elder people contribute genuinely to social and economic life and that their human rights and freedoms are fully realised is linked to building a society for all ages.

In the modern context, very important is not only and not so much the number of the population as the development of human capital – educational attainment, health condition, social and labour mobility, competences and skills, quality of life and standard of living.





Figure 1: Outline of objectives, priorities, measures of the National comprehensive strategy for active ageing





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The implementation of the strategic goal should produce the following outputs:

- ⇒ Active and independent ageing
- ⇒ Active participation of elder people in all aspects of social life
- ⇒ Healthy ageing and support to elder people to develop their full potential, guaranteeing them a life of dignity and independence
- ⇒ Created institutional capacity for coordination and implementation of the Strategy at national and regional level

The strategic goal is elaborated into operational objectives, which are developed in line with the major conclusions of the Analysis and the views expressed within the regional round tables. They also take into account the operational objectives of the National Concept for Promotion of Active Ageing in Bulgaria (2012-2030), while elaborating and building on them.

The operational objectives include:

Operational objective 1: To create conditions for active working life of elder people.

Operational objective 2: To adapt the social security and the pension system to population ageing while ensuring financial stability, conditions for active and decent life in retirement age and for curbing poverty among retired people.

Operational objective 3: To ensure access to education, lifelong learning, training and retraining of elder people with a view to improving their labour market mobility.

Operational objective 4: To encourage participation of elder people in all spheres of social life, in cultural, sport and community activities.

Operational objective 5: To promote volunteering.

Operational objective 6: To ensure equal access to health services and increase life expectancy in good health of elder people.

Operational objective 7: To create conditions for independent ageing, out of poverty and in adequate and safe housing conditions, by developing, upgrading and improving the quality of integrated long-term care, equal access to social services, developing the so-called “silver economy”.

Operational objective 8: To build capacity at the national and at the regional level for the design and establishment of active ageing policies.

Each of the components of the analysis is covered and addressed by the objectives of the Strategy. The Strategy incorporates all of the important elements included in the Strategic



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Planning and Policy Design Methodology prepared by the Administration of the Council of Ministers of Bulgaria. (www.strategy.bg)

Figure 2. Priorities and elements included in the Strategy



The following priorities of the Strategy have been identified:

Priority 1: Promoting active ageing in the employment domain

Priority 2: Promoting active ageing in the participation in society domain

Priority 3: Promoting active ageing in the independent living domain

Priority 4: Capacity building and creating active ageing enabling environment at national and at NUTS 2 level.





Table 3.Outline of objectives, priorities, measures of the National comprehensive strategy for active ageing

Strategic Goal: Creating conditions for decent life of elder people by providing equal opportunities for their full-fledged participation in economic and social life			
<i>Expected results</i>			
Active and independent ageing	Active participation of elder people in all aspects of social life	Healthy ageing and support to elder people to develop their full potential, guaranteeing them a life of dignity and independence	Created institutional capacity for coordination and implementation of the Strategy at the national and at the regional level





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Operational objectives			
Operational objective 1: To create conditions for active working life of elder people. Operational objective 2: To adapt the social security and the pension system to population ageing while ensuring financial stability, conditions for active and decent life in retirement age and for curbing poverty among retired people. Operational objective 3: To ensure access to education, lifelong learning, training and retraining of elder people with a view to improving their labour market mobility.	Operational objective 4: To encourage participation of elder people in all spheres of social life, in cultural, sport and community activities. Operational objective 5: To promote volunteering.	Operational objective 6: To ensure equal access to health services and increase life expectancy in good health of elder people. Operational objective 7: To create conditions for independent ageing, out of poverty and in adequate and safe housing conditions, by developing, upgrading and improving the quality of integrated long-term care, equal access to social services, developing the so-called "silver economy".	Operational objective 8: To build capacity at the national and at the regional level for the design and establishment of active ageing policies.





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Priorities			
Priority 1: Promoting active ageing in the employment domain	Priority 2: Promoting active ageing in the Participation in society domain	Priority 3: Promoting active ageing in the independent living domain	Priority 4: Capacity building and creating active ageing enabling environment at national and at NUTS 2 level
Measure 1: Promoting opportunities for labour market participation of elder people.	Measure 1: Encouraging social inclusion by involvement in different forms of social and cultural life.	Measure 1: Health promotion and disease prevention.	Measure 1: Capacity building for the institutions coordinating the policies for elder people.
Measure 2: Ensuring opportunities for vocational education and training.	Measure 2: Encouraging Participation in society.	Measure 2: Improving the living conditions.	Measure 2: Stakeholder capacity building as regards policies for elder people.
Measure 3: Improving the working conditions.	Measure 3: Promoting volunteering.	Measure 3: Improving transport accessibility.	Measure 3: Continuous update of local, regional and national policies.
Measure 4: Provision of specialised services for elder workers.	Measure 4: Lifelong learning.	Measure 4: Promoting the supply of goods and services adapted to the needs of elder people.	Measure 4: Improving the attitudes to elder people and anti-discrimination communication.
Measure 5: Adapting the social	Measure 5: Providing support	Measure 5: Maximum	Measure 5: Improving the



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security and the pension system to population ageing.	to informal caregivers.	autonomy in long-term care	monitoring and coordination system.
Measure 6: Providing flexible labour market services which encourage reconciliation of work and care.			Measure 6: Promoting the strategy, communication and encouraging national and local business to contribute to active ageing measures.



5. PRIORITIES, MEASURES AND TASKS

5.1. Priority area 1. Promoting active ageing in the employment domain

General problems and challenges in the labour market

The summary analysis presents characteristic of the labour market and indicators related to the elderly. In addition, the discussions held at the regional roundtables identified general trends related to the current measures taken and programmes to boost employment for the population over 55 years of age. The *Green Paper on demographic change*¹⁵ has detected that the increase in the statutory retirement age alone would not solve the problems connected with demographic challenges. This measure would drive many of the elderly below the poverty line, particularly women. So the agenda of regional roundtables covered options to increase the actual retirement age via initiatives to boost the opportunities to extend working life, together with effective policy to increase jobs and employment opportunities. Active ageing policy alone, aimed at increased participation in training and lifelong learning, can sustainably boost employment rates among elder people, who give up work early due to health issues, workload, layoffs and lack of opportunities for training or re-entering the labour market. Furthermore, the increase in the statutory retirement age can increase the pressure on other pillars of the pension system, such as disability pensions or minimum income, which happened in some Member States, and thus would prevent the stabilisation of public finances.

According to the latest quarterly European Commission report¹⁶ on employment rates of July 2016, the indicators for all population groups are improving, especially for elder workers. For the fourth quarter of 2015, the employment rate in the EU increased for all population groups, most notably for people aged 55-59. (1.3 percentage points) and those aged 60-64 (1.6 percentage points). This encouraging trend has been observed in recent years and led to an increase of 8 percentage points in the employment rate of elder workers compared with 2008. For the fourth quarter of 2015, the employment rate of young people aged 20-24 (1.3 percentage points) and aged 25-29 (1.0 percentage points) increased significantly. Still, the employment rate of young people remains much lower than in 2008: a difference of 4

¹⁵ *Green Paper on demographic change*, page 5.

¹⁶ *Employment, Social Affairs & Inclusion, EU Employment and Social Situation Quarterly Review, Summer Review 2016*:p.22: date 28/06/2016: <http://ec.europa.eu/social/main.jsp?catId=113&langId=en&furtherPubs=yes>

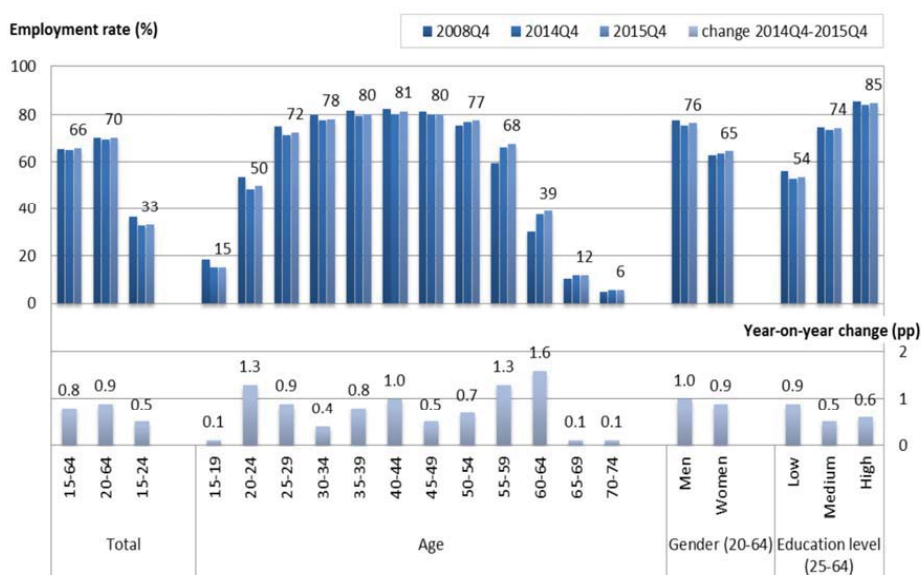




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percentage points for 20-24 year-olds and a margin of 2.7 percentage points for 25-29 year-olds.

Figure 4: Employment rate at EU level and breakdown by year, sex and educational level for the period 2008-2015.



Source: EC

In all regions there as a clear public opinion that employers are reluctant to hire people over 55, describing them as unproductive and of lost work habits.

The second topic has emerged as a natural follow-up - the need for further vocational education and training with the option of sharing experience. On the one hand, a lack of willingness in this age group for continued employment and/or further involvement. The most common reasons include poor health, difficulty overcoming negative public attitude of "irrelevance" and inability to handle modern technologies. On the other hand, the business is experiencing a shortage of skilled workforce.



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Therefore, the priority axis addresses directly the following operational objectives:

Operational Objective 1: To create conditions for the working life of elderly people.

Operational Objective 2: To adapt the social security and pension system to the ageing of the population by providing financial stability, conditions for active and decent life in retirement age and to reduce poverty among pensioners

Operational Objective 3. To secure conditions for access to education, lifelong learning, training and retraining of elder people with a view to improving mobility in the labour market

This priority area includes measures to increase the opportunities for participation of elder people in the labour market, including by removing barriers and disincentives to their retention on the labour market. The measures are supplemented also by those aimed at continuing vocational education and training to enable elder people to meet in a flexible way the needs of the ever-changing labour market. This area also includes measures to improve working conditions with a special emphasis on health and safety in the workplace and to create a favourable environment at companies for inclusion of elder people in the labour process, creating conditions for teamwork and maximum use of the experience of every worker/employee, regardless of their age. This priority area includes further measures that focus on prevention of age-based discrimination in general, including those aimed at offering different services for elder people in connection with employment and measures to encourage employers to pay special attention to issues related to adult population and equality of all ages. Last but not least, specific attention is paid to measures that enable elder people to reconcile work and care for their dependent relatives (children, grandchildren, elderly or sick relatives), as well as measures aimed at creating conditions, including legislation on flexible pension schemes that combine employment and pension.

A growing trend shows that overall demand for skills will continue to increase more in the future. In addition, policies must ensure the adaptability of the workforce to new requirements.

Continuous training and lifelong learning will contribute to the skills of people to follow the structural changes in the labour market. Namely this aspect emerges in the Bulgarian context in



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all regions of the country as a condition for meeting and overcoming demographic challenges. Adequate and timely measures taken as regards lifelong learning and inclusion of the actively ageing generation therein will be crucial. The number of young people entering the labour market in the next decade will not be able to match all the demand on the labour market. This will have consequences for the education system as a whole and for the system of vocational training and preparation of professionals, in particular. While being important for the more adequate response to the requirements of the labour market, education and training will not be able to solve the problem of over qualification and shortage of qualification. Therefore, it is important to take synchronous measures to properly assess skills, to prevent the loss of such and to derive the greatest possible benefit from those available.

Measures proposed within this priority include:

1. Promoting opportunities for participation of elder people in the labour market,
2. Providing opportunities for vocational education and training
3. Improving working conditions
4. Providing specialised services for elder workers
5. Adaptation of the social security and pension system to population ageing,
6. Providing flexible services in the labour market, promoting the reconciliation of work and care.

Proposals for specific measures per area:

Acquiring skills is a costly process in the long run, whether it involves formal education (primary, secondary and tertiary) or specific training/ vocational guidance in an enterprise. Economic growth would be impossible if companies had to deal with lack of skilled labour force, which is a warning expressed by the Bulgarian business in recent years. Therefore, the support and the acquisition of qualifications must be supported more actively by national education policies and must match the needs of a particular area.

Increasing skills at all levels is a necessary condition not only to revive the economy in the short term, but for sustainable development in the long term, to increase productivity, competitiveness and employment across the country and within the EU to ensure equal opportunities and also social cohesion. Predicting the future needs of the labour market has its limits and it is therefore necessary to continuously develop and improve mechanisms and instruments.

The table below proposes specific tasks to carry out defined measures and proposed specific measures and targets per region and competent institution.




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Priority 1

Table 4. Proposals for specific measures per region - Priority 1

Priority 1: Promoting active ageing in the employment domain			
Measures	Main tasks	Regional emphases - specific measures per region	Responsible institution
Measure 1: Promoting opportunities for participation of elder people in the labour market	<ul style="list-style-type: none">• Promoting the adoption at enterprises of age management strategies that will enhance their competitiveness by using experience and specific qualities of elder workers;• Providing detailed advice and support to jobseekers and proactive support for employment mediation (including subsidised employment, support to start work, social projects) and where necessary taking measures for long-term integration;• Funding active labour market policies and long-term planning for job centres;	Northeastern region <input type="checkbox"/> Providing incentives/ benefits for employers hiring elder people, and adoption thereof as part of a legislative act; <input type="checkbox"/> Developing and carrying out an assessment of the impact of legislation for each bill; <input type="checkbox"/> Coordination of actions between the institutions - local authorities,	MLSP, EA, NRA, employers' organisations, regional administrations, municipalities
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<ul style="list-style-type: none">• Introducing measures aimed to prepare physically and mentally workers to stay longer in active employment, above all by reducing pressures at work and adapting working conditions;• Introducing flexible forms of employment for those in pre-retirement age;• Taking measures to differentiate employment opportunities in pre-retirement and retirement age;• Introducing different packages linking training and experience;• Providing learning opportunities for younger, involving more experienced elder workers; creating opportunities for mentoring;• Promoting entrepreneurship among people over 55;• Providing opportunities to work at home with flexible working hours for people in pre-retirement	<p>state institutions and employers' organisations in ensuring employment for the elderly;</p> <p><input type="checkbox"/> Taking measures to differentiate employment opportunities in pre-retirement and retirement age;</p> <p><input type="checkbox"/> Providing flexible employment and hourly wages by industry;</p> <p><input type="checkbox"/> Providing funding through public-private partnerships to enable community centres, involving businesses to provide various services and forms of employment for elder people to develop social enterprises;</p> <p><input type="checkbox"/> Enhancing coordination and cooperation between responsible institutions;</p> <p><input type="checkbox"/> Development of models to validate</p>
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	and retirement age; <ul style="list-style-type: none">• Developing additional incentives for employers who hire persons over 55.• Training and lifelong learning and adequately addressing ageing in the education system;• Encouraging elder workers to be more involved in further training (training initiatives for people over 40, incentives for active participation in complementary in-house training, particularly for lower-skilled jobs, etc.);• Demand and supply of opportunities from a regional chamber of crafts: delivering modules for retraining and retention of elder people in exhibitions, events;• Retraining, development and improvement of the process of validation of knowledge, skills and competences to achieve quality that meets the needs of persons of 55+ for successful professional	knowledge and skills; <ul style="list-style-type: none"><input type="checkbox"/> Evaluating personnel that will be needed in the region, training/retraining in areas in demand on the market, and thus overcoming the shortage of well-trained workforce in certain sectors;	
Measure 2: Providing opportunities for vocational education and training		North-Central Region <ul style="list-style-type: none"><input type="checkbox"/> Additional incentives to employers and implementation of measures for employment of elder people;<input type="checkbox"/> Strengthening the role of trade unions in the process of negotiating working conditions for people over 55;<input type="checkbox"/> Encouraging rural tourism as a form of employment for people over	The MLSP, MES, trade unions and employers



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	development and of society for appropriately qualified workforce; <ul style="list-style-type: none">• Mentoring by transferring and sharing experience - elder people of knowledge and skills teach younger ones. Thus the elderly do not leave abruptly their workplace and have a smooth transition to retirement and receive appropriate remuneration.	55; <ul style="list-style-type: none"><input type="checkbox"/> Organising farmers markets for certified organic brands and delivering products of domestic gardens of people aged "55+";<input type="checkbox"/> Encouraging initiatives to promote the employment of various NGOs;<input type="checkbox"/> Eligibility of NGOs and community centres under measures for employment;<input type="checkbox"/> Flexibility of legislation in respect of occupation - different packages linking training and experience;<input type="checkbox"/> Providing learning opportunities for younger involving more experienced elder workers;<input type="checkbox"/> Building a closer and active relationship with the MES and	
Measure 3: Improving working conditions	<ul style="list-style-type: none">• Adapting the work environment to the needs of the elderly;• Increasing employment rates of elder workers by improving working conditions;• Encouraging employers to improve the working environment and flexible forms of employment for workers over 50.;• Investing in improvements and adapting the working environment and workplaces for workers over 50;		MLSP, GLI, NRA, employers and trade unions





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	<ul style="list-style-type: none">• Incentives for better protection of health in the workplace, generally available company programmes to maintain health, preventive medicine and protection of employees.• Improving labour legislation and regulatory framework to ensure active ageing on the labour market;• Maintaining gender balance in terms of employment, equal pay for equal work, equal opportunities for career development and professional advancement in the workplace, equal treatment of women and men in the labour market;• Introducing measures to raise awareness as to elder workers (evaluation of experience and transfer of skills acquired during working life to younger workers), advice and support for companies, especially small and medium-sized enterprises, strategic human resource planning and	<p>promoting vocational training.</p> <p>Northwest region</p> <ul style="list-style-type: none"><input type="checkbox"/> Demand and supply of opportunities from a regional chamber of crafts: delivering modules for retraining and retention of elder people in exhibitions, events;<input type="checkbox"/> Providing courses at training centres or branches of educational institutions for retraining of specialists based on the demand for labour force;<input type="checkbox"/> Retraining, development and improvement of the process of validation of knowledge, skills and competences to achieve quality that meets the needs of those aged 55+ in	
Measure 4: Providing specialised services for elder workers			MLSP, EA, the Agency for People with Disabilities, NRA



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	development of forms of work organisation favourable to elder workers; <ul style="list-style-type: none">Enhancing financial knowledge and culture of elder workers.	terms of successful professional development and of the public - via adequately qualified workforce; <input type="checkbox"/> Mentoring by transferring and	
Measure 5: Adapting the social security and pension system to population ageing	<ul style="list-style-type: none">Improving labour legislation and regulatory framework to ensure active ageing on the labour market;Introduction of socially acceptable incentives for later retirement and, where possible or desired, development of attractive models for a smooth work-to-retirement transition within the public pension system (including expanding opportunities for working part-time for seniors);Introducing flexible forms of employment for persons of retirement age, without creating imbalances in the labour market and intergenerational conflicts;Overcoming negative attitudes of employers	<input type="checkbox"/> sharing experience - elder people of knowledge and skills transfer younger people. Thus the elderly do not leave abruptly the field in which they work and have a smooth transition to retirement and receive appropriate financial reward; <input type="checkbox"/> Reviving agriculture with coverage of elderly people of experience and transfer of their experience; <input type="checkbox"/> Creating public-private partnerships under projects and programmes; <input type="checkbox"/> Organising farmers market to	MLSP, NSSI, NRA, employers



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	towards elder people and encouraging the longer use of their working experience and skills; <ul style="list-style-type: none">• Raising awareness as to the condition and trends in the pension system;• Developing specific action plans aimed at dramatically reducing the unregulated labour market, with a particular focus on the coordination between various state institutions;• Improving the social security culture of employees;• Encouraging voluntary social security contributions of the population in covering insurance risks;• Improving control over social security payments, controlling and preventing the unlawful receipt of pensions (especially disability pensions due to sickness);• Enlarging the range of insured persons and	sell only their own products and ready meals made by elder people; <input type="checkbox"/> Promoting tourism in the region - actively promoting natural activities in the area to increase the tourist-flow and employment locally; <input type="checkbox"/> Form of private business - guesthouses for rural tourism and banking preferential conditions for people over 55 who are work in rural tourism; <input type="checkbox"/> Development of rural tourism in the area - elderly people not only provide accommodation but also provide food for guests, with local production as an activity for which they receive remuneration; <input type="checkbox"/> Providing opportunities to work at
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	limiting informal employment; <ul style="list-style-type: none">• Achieving acceptable and sustainable balance between life expectancy and time spent in retirement by motivating those entitled to pensions to continue their active working life, if their health permits so, with a particular focus on people who go into pension earlier;• Stepping up incentives for employment for the elderly.	home with flexible working hours for people in retirement and pre-retirement age; <input type="checkbox"/> Developing incentives for employers who hire persons over 55. Southeast region <input type="checkbox"/> Support and conditions for the creation of part-time jobs; <input type="checkbox"/> Providing comprehensive medical care; <input type="checkbox"/> Opportunities for training/retraining and/or acquiring new skills / knowledge - language, computer literacy, practical skills, etc.;
Measure 6: Providing flexible services on the labour market, promoting	<ul style="list-style-type: none">• Providing funding through public-private partnerships to enable community centres, involving businesses, to provide various services and forms of employment for the elderly;• Encouraging employers and municipalities to establish social enterprises - such as the opening of mini plants for the manufacture of various objects (eg. martenitsi) where only the elderly work;• Public-private partnerships to promote small	<input type="checkbox"/> Inclusion of elder people in the production of local agricultural products;
		MLSP, district administrations, municipalities, community centres, NGOs



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the reconciliation of work and care.	businesses among elder people with help from the local institutions and non-governmental organisations and others; <ul style="list-style-type: none">• Career counselling for elder workers.	<div><input type="checkbox"/> Participation in the tourism industry through various activities after acquiring qualification - tour guide, representative of the tour operator/s, etc.</div> <div>South-Central Region</div> <div><div><input type="checkbox"/> The overall attitude of employers and other groups in society to the appointment of elder people by adapting to the requirements of jobs to the specificity of age, retention of experience, etc.;</div><div><input type="checkbox"/> Voucher payment to employees in retirement age;</div><div><input type="checkbox"/> Sharing experience and bridging the gap between generations - old and young in cultural centres -</div></div>
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		existing community centres to share experience and organisation of mutual learning;
		<input type="checkbox"/> Involving elder people in the agricultural sector by encouraging the production of local agricultural products;
		<input type="checkbox"/> Creating incentives for employers.
		Southwest region
		<input type="checkbox"/> Providing flexible working hours for elder people;
		<input type="checkbox"/> Foreign investment to stimulate the recruitment of local workforce;
		<input type="checkbox"/> Financial support and incentives from the state for employers;
		<input type="checkbox"/> Awareness raising as to the employment of elder through a





	<p>communication strategy (involving media);</p> <p><input type="checkbox"/> People over 55 receive guidance as regards employment consistent with their age and not just the specificities of their profession;</p> <p><input type="checkbox"/> Organising training/ courses for training / retraining of people over 55;</p> <p><input type="checkbox"/> Reforming training curricula;</p>
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5.2. Priority area 2: Promoting active ageing in the Participation in society domain

The active participation of citizens¹⁷ in the process of policy making has proven over time to be a good investment for more efficient management, contributing to increasing citizens' trust in management, improving the quality of democratic processes and boosting civic potential.

Moreover, the involvement of a broad range of people in decision-making leads to the adoption of better solutions, as each participant contributes with their experience and knowledge. Last but not least, direct citizen participation gives much more depth and better results than traditional methods in the process of survey of public attitudes.

General problems and challenges in the participation in society domain:

Volunteering¹⁸ is a relatively new social practices developed in recent years around the world; it is entering more slowly in Bulgaria, thanks mostly to the NGO sector. At the same time it is a priority in European and Bulgarian policy in different areas - social, educational, economic and others.

One form of active ageing is volunteering. It is a factor in the creation of human and social capital, integration and employment, improving social cohesion.

Volunteering pertains to the fundamental values of the European Union: justice, solidarity, inclusion and a sense of citizenship. Volunteers contribute to enriching the image of European society, and those who work outside their home countries contribute actively to building a Europe of citizens.

Opportunities for voluntary activities for and from the elderly are associated with the development of a number of EU policies such as lifelong learning, rural development,

¹⁷ Guide to Citizen Participation in Solving European Issues - http://www.osf.bg/cyeds/downloads/Guide_CitizenPanel.pdf.

¹⁸ <https://ngodiva.alle.bg/volunteering/>





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development of mass sports, development of various forms of cultural activity, long-term care, care for dependent family members, assistance to victims of disasters, etc.

In general, the term "volunteering" means all forms of voluntary activity, whether formal or informal. Volunteers act on their own will, personal choice and motivation, without seeking financial gain. Volunteering is striving for solidarity and represents a way for individuals and associations to assist in solving problems of human, social or environmental nature.

Several major problems have been identified in respect of the full use of volunteering as a means to promote active ageing and solidarity between generations.

First, it is the lack of a clear legislative framework. Currently, Bulgaria has not yet adopted a law devoted exclusively to the regulation of volunteering - it exists only as a draft prepared in 2006, and in 2011 it was updated.

The lack of legislative provisions creates problems, as for example at present it is not clear who is responsible in the event that an accident happens to the volunteer while volunteering. There is a problem with the Labour Code because, according to its provisions any labour is paid. Organisations that work with volunteers do not feel motivated because their activities are governed by the legislation in a fragmented way. Important aspects remain unexplained such as training, leave entitlements, social security, the right to unemployment benefits for cross-border volunteering activities, accommodation, reimbursement of own funds. There are also a number of financial restrictions: volunteering, while provided free of charge, is not free. Those relying on volunteer organisations are often faced with a shortage of sustainable funding, and the competition for available funds is merciless. There are no tax incentives to add to the funding of volunteering activities from natural and legal persons. The only relevant provisions are available in the Corporate Income Tax Act, which provides that legal persons referred to in the Act may cover eligible accounting expenses on donations totalling up to 10% of the positive





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financial result (profit) when the cost of donations were made for the benefit of the Red Cross. A similar provision is available in the Personal Income Tax Act, with the rate being 5%.

The mismatch between supply and demand, and the lack of recognition are other important problems identified - a growing trend at European level for turning volunteering into profession leads to a mismatch between the needs of volunteering organisations and those of new volunteers. Volunteers are ready to join short-term projects while organisations need people in the long run. Moreover, the skills gained through volunteering are not always sufficiently recognised or properly assessed. Efforts should be channelled into the effective recognition of acquired skills through volunteering validation of experience and the recognition of equivalence for the purposes of training and job search. Furthermore, general awareness should be raised as to the importance of volunteering as an expression of civic participation which contributes to issues which are of common concern of all Member States, including the harmonious development of society and economic and social cohesion and promotion of volunteering activities in order to make them more attractive to citizens.

The following issues are still under discussion: opportunities for recognition and validation of experience gained through volunteering, i.e. whether volunteering labour should be respected as practical experience, and informal training, work experience, and it is connected somehow to security rights of volunteers; employment opportunities in volunteering to take leave for training - two days per year, in finding appropriate safeguards to prevent abuse; when applying for a job and other conditions being equal, volunteers take precedence; volunteering should be included as a priority in municipal programmes, since the best practices in this field are not sufficiently promoted; whether volunteering should be recognized as a length of service and whether it is possible to be accounted for by contract for volunteering with user volunteer work for a certain time employment; at universities volunteers who have proven to be eligible should have incentives such as benefits and scholarships in order to promote and build a culture of volunteering; volunteering should be institutionalized in some way and this will not lead to





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commercialization; there should be volunteering bodies at local level, where volunteer activities are planned based on the needs of each municipality and national level to operate a national coordination centre; what is the status of such national coordinating centre; benefits and validation of skills of volunteers; sources of funding, etc.

Examination of problems faced by volunteering with a view to its use as part of the instruments to promote active ageing and the development of solidarity between generations. The population over the retirement age is becoming more numerous while it is heterogeneous with different economic, health and social capacity. Different conditions and lifestyles, different life experiences influence the opportunities and preferences for participation in volunteering activities 169. One of the main reasons for the low participation in volunteering of and for the elderly includes the deteriorating living conditions of some groups of people who often have to cope not only with low income but with serious physical disabilities. Therefore, it is important to take measures that are aimed at the general improvement of conditions and quality of life of elder people. Programmes designed specifically for participation of elder people as volunteers are rare. Furthermore, organisations that deal with analyses of specific cases differ in terms of the importance they attach to the objective of social inclusion through volunteering.

Operational objectives that address this priority are:

Operational Objective 3: To ensure conditions for access to education, lifelong learning, training and retraining of elder people with a view to improving mobility in the labour market

Operational Objective 4: To promote participation of elder people in all spheres of public life, in cultural, sports and social activities

Operational objective 5: To promote the development of volunteering

The priority area for promotion of active ageing in the areas of civic participation pertains to problems, opportunities and social inclusion measures and greater involvement of elder people



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in various forms of social life, volunteering and support in making processes decisions at national and local level. Volunteering plays a key role in different spheres of life¹⁹.

The measures in this priority are:

1. Promoting social inclusion through participation in various forms of social and cultural life.
2. Promoting civic participation.
3. Promoting volunteering.
4. Lifelong learning.
5. Providing support to informal caregivers.

All participants in the roundtables in six regions of the country agreed on the importance of cultural institutions and their role in creating opportunities for active participation in both the intellectual development of the elderly, and recreational and sport activities.

¹⁹ http://www.pointsoflight.org/sites/default/files/site-content/files/social_impact_of_volunteerism_pdf.pdf



Priority 2

Table 5. Proposals for specific measures per region – Priority 2

Priority 2: Promoting active ageing in the civic participation domain			
Measures	Main tasks	Regional emphases - specific measures per region	Responsible institution
Measure 1: Promoting social inclusion through participation in various forms of social and	<ul style="list-style-type: none"> Expanding the social function of community centres in support of the elder generation - as a centre for organizing information meetings and implementing the educational function to stimulate lifelong learning; Organising joint projects between community centres and the Red Cross as an opportunity to provide social services; Changing public attitudes through direct activity and high motivation among the elderly 	Northeastern region <ul style="list-style-type: none"> Construction / upgrade of sites to provide services (communication channels, etc.) for better awareness among elder people about the opportunities for involvement in various initiatives; Ensuring a high level of security for seniors in small towns using the resource BRC - creating groups for 	MLSP, MC, MMC, regional and municipal administrations, BRC



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cultural life.	(creating a sense of fulfilment, significance, commitment on a personal level and rejection of stereotypes); <ul style="list-style-type: none">• Promoting physical activity of elder people;• Promoting participation in sports and cultural events	assistance with the logistical support of the Red Cross; North-Central Region <input type="checkbox"/> Regulation of volunteering by a law for volunteering; <input type="checkbox"/> Increasing the activity of elder people and their active involvement in various initiatives in terms of donation and volunteer campaigns; <input type="checkbox"/> Inclusion of elder people in the development of the local cultural and sports calendar; <input type="checkbox"/> Participation in various mass events promoting traditions and patriotism, including continuity / joint initiatives of young and elder people; <input type="checkbox"/> Inclusion of amateur and	Community centres, municipalities, district administrations, employers' organisations
	Measure 2: Promoting civic participation.		





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	elder people; <ul style="list-style-type: none">• Promotion of integration activities between young people and elder people in the community;• Promoting local initiatives that take advantage of local infrastructure for elder people;• Promoting access for elder people to electronic information and services through training and support.	independent ensembles in mass events in different locations in the region; <input type="checkbox"/> Information on cultural and sports events and participation as performers and audiences; <input type="checkbox"/> Formation of clubs (female sections / pensioners - intellectuals;)	
Measure 3: Promoting volunteering.	<ul style="list-style-type: none">• Active involvement of people in retirement age in volunteering networks of solidarity and care for the oldest;• Stimulating the voluntary participation of people in retirement age in the social life of the community and the development of civil society;• Promoting volunteering among young people in favour and support of the elderly;• Engaging community centres in supporting active and dignified ageing;	and initiatives - recipes and other household skills; <input type="checkbox"/> Supporting Associations of pensioners by providing funds for the organisation of events; <input type="checkbox"/> Participation in NGOs and institutions on a voluntary basis, with the possibility of organising informal meetings - NGOs; pensioners' clubs; community centres;	MLSP, MC, NGOs



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	<ul style="list-style-type: none">• Regulation of volunteering by law for volunteering;• Increasing the activity of elder people and their active involvement in various initiatives in terms of donation and volunteer campaigns.	<input type="checkbox"/> Involvement in polls as contractors (interviewers); <input type="checkbox"/> Participation in sports and cultural activities for the elderly: <ul style="list-style-type: none">- along the lines of Veliko Tarnovo	
Measure 4. Lifelong learning.	<ul style="list-style-type: none">• Launching initiatives to stimulate private investment in education (PPP) in the field of human resources development and training;• Implementation of financial (fiscal) incentives to support employers to facilitate the implementation of training programmes for elder people;• Stepping up investment in human capital by the state, particularly in adult learning;• Redirecting resources to new priority sectors (formal and informal learning, adult learning, etc.);• Increasing the involvement of the social partners;	<p>Runs;</p> <ul style="list-style-type: none">- sports tournaments;- Initiatives for Grandparents and Grandchildren;- clubs for veterans / "old games"; <p><input type="checkbox"/> The municipality through informal leaders and respite care should reach broad awareness, the possibility of delegation of rights and responsibilities;</p> <p>Northwest region</p> <p><input type="checkbox"/> Organising events of a competitive</p>	MES, trade unions and employers' organisations





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	<ul style="list-style-type: none">Increasing forms of adult education offered by schools and universities;Increasing the number of people who have access to basic knowledge and skills that should be guaranteed to all citizens and are a prerequisite for further lifelong learning;Promoting adult access to education and training in information and communication technologies that will allow them to remain active and participate fully in society;Starting the measures addressed to enhance participation in lifelong learning of elder workers or citizens who need to improve their skills or to prepare for retirement;Development of information, guidance, counseling as services designed to detect potential opportunities and benefits of adult learning;Strengthening the process of "convergence"	<p>nature without tangible rewards, but ensuring recognition with a certificate for a particular contribution to the local community;</p> <p><input type="checkbox"/> Support for the emotional significance of people over 55 with various initiatives:</p> <p><input type="checkbox"/> Transfer of experience and elimination of the sense of social exclusion;</p> <p><input type="checkbox"/> Hiring elder people as consultants in various fields - ex: cooking;</p> <p><input type="checkbox"/> Sending thank-you letters / addresses / diplomas on various occasions as moral incentives and recognition of achievements by local authorities;</p> <p><input type="checkbox"/> Organising contests for "Super</p>	
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	between the education, training and retraining systems and obtaining new knowledge and skills through adapting admission requirements, passing the training and recognition of diplomas (via mechanisms for accreditation, methodology and systems of evaluation and validation).	Grandma" and "Super Grandpa", for the best in specific activities: a grandfather knitter; a grandmother / grandfather winemaker; a grandmother / grandfather who raised their grandchild, etc.;	
Measure 5: Support for informal caregivers	<ul style="list-style-type: none">• Development of schemes to transfer experience from elder to younger people;• Raising awareness and understanding as to the problems of the elderly;• Developing and offering innovative social services;• Providing vouchers for hourly social services.	<input type="checkbox"/> Organising camps for elder people for a couple of days;	
		<input type="checkbox"/> Raising awareness of elder people through various channels;	MLSP
		Southeast region	
		<input type="checkbox"/> Strengthening connections between generations through mutual sharing of experience between elder and young people, including engaging the elder generation in activities with children, payment of utility bills, etc.;	MLSP



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	<div><input type="checkbox"/> Developing projects that encourage preservation and promotion of traditions, kept by the elderly;</div> <div><input type="checkbox"/> Activation of various organisations of the elderly and organising various sports initiatives for them;</div> <div>South-Central Region</div> <div><input type="checkbox"/> Taking care of children and relatives;</div> <div><input type="checkbox"/> Expanding the social function of community centres in support of the elder generation - as a centre for organising information meetings and educational function to stimulate lifelong learning;</div> <div><input type="checkbox"/> In response to the strategy for lifelong learning and mentoring -</div>	
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	exchange of experience with practical modules in which mentors are elderly and are paid hourly for their employment;	
	<input type="checkbox"/> Organising awareness raising campaigns about the national strategy for lifelong learning;	
	<input type="checkbox"/> Volunteering at improving infrastructure in small towns;	
	<input type="checkbox"/> Organising joint projects between community centres and the Red Cross as an opportunity to provide social services	
	Southwest region	
	<input type="checkbox"/> More active participation of elder people in decision-making;	
	<input type="checkbox"/> Participation in cultural life in	





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	various forms and interests; <input type="checkbox"/> Participation in volunteering activities; <input type="checkbox"/> Changing public attitudes through direct activity and high motivation among the elderly (creating a sense of fulfilment, significance, commitment on a personal level and rejection of stereotypes).	



5.3. Priority area 3: Promoting active ageing in the independent living domain

In the last decade Europe saw the development of the concept of the silver economy that aims to promote the creation of a wide range of products and services for the growing number of elder people with health and care needs, reduced mobility and limitations in their daily lives.

A large portion of the population across the country has been affected by a shortage of alternative and affordable forms of support for family care for the elderly. The potential for family care has gone down and the adult population increasingly requires professional support in addition to informal care provided by their children to ensure a better quality of life. In addition, this part pertains to general attitudes per region and focuses on individual measures to the specific needs for the promotion of healthy lifestyles, improving the quality and accessibility of health services, improving prevention, as well as diversification of social services for the elderly. Special attention will be paid to financial literacy and financial independence of seniors, opportunities for social mobility and more.

General problems and characteristics in the domain of independent and secure life of the elderly in good health:

Elder people represent one of the largest groups of individuals with needs for social services and therefore require substantial resources. The steady ageing trend suggests requires adequate measures in the field of independent and autonomous life for people aged 55 and over.

According to the opinion of the World Health Organisation, during the last year of human life on average, half of all costs are spent on hospital treatment and care. This fact, along with the lowest life expectancy in the country leads to the conclusion that the **continued ageing of the nation will exert increasing pressure on the system of hospitalisation, health and social services. This trend is projected in the larger settlements in the country.**





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Many people over 65 who have retained their capacity for independent living, suffer from serious underlying **medical problems. Moreover, the overall health of elder people entering specialised institutions deteriorates. A significant percentage of the elderly with needs of social services belong to groups of people with disabilities.** Hence it is difficult to distinguish them from the group of disabled people.

Often people who have generally retained the ability for independent living after a stroke or complications of chronic diseases receive sensory, physical or other disabilities and therefore they need adequate social services consistent with these disabilities.

A major provider of social services is the municipality. This is due to the decentralisation of the provision of social services. There is an uneven distribution of social services across the country, due to the lack of purposeful planning based on a preliminary study of the real needs in the community.

There is lack of funds and instances of real estate fraud against lonely elderly people who own homes in the capital, leading to an increase in the number of people over 65 among the homeless and begging. This process develops also due to the lack of support for the elderly from their families as a result of which they are forced to beg and make a living on the street.

The main problems in the use of social services, such as services for the elderly, include poverty, lack of information, lack of accessibility of services, lack of services.

The geographical coverage of social services in areas in Bulgaria is uneven, although it usually reflects differences in population. The administrative centres with larger populations provide more social services with greater capacity. The institutional model of care for the elderly is still dominant. Sometimes this type of care is characterized by depersonalization, lack of flexibility in the daily routine and programme, group approach and social distance. But the fact is that in Bulgaria there is still demand for institutional care, especially for elderly people.

All areas require measures to be taken meant to:



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- Improve and organise the system of social services so that it can function and evolve constantly in the interest of the people in the region;
- Transform and open up the so-called mainstream systems because mostly in these areas there is a gap between the elderly and "other", which is the main reason for their inability to adapt, to be accepted by society and this results in social exclusion.
- Form an accepting attitude in society: the main challenge which we face. Changes must take place not only at country level but also in society - as a whole. Change happens through "live meeting" and communication with people over 55 - more than 74, helping them to gain visibility.

Across the country, there is an emphasis on the importance of creating an environment with universal design and support for independent living of elder people. In Sweden, this experience proved to be cost-effective. The declining demand for assistance there over the past 15 years cannot be explained by improved health, as there is no evidence of such among - the elderly for that period. The most likely explanation for the reduced demand for care for elder people is better accessibility of housing and transport, and better access to assistive technologies that allow the elderly to cope on their own. It should be noted that Sweden has the best employment rate of elder workers and elder women of all EU member states, which refers to the continuous interrelation of the 4 areas of the Active Living Index.

Operational objectives addressed:

Operational objective 6: To provide equal access to health services and extend the life in good health of elder people

Operational objective 7: To create conditions for independent living of elder people out of poverty and into appropriate and safe housing with development, modernization and improvement of the quality of the integrated long-term care, equal access to social services, development of so-called "silver economy"





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Operational objective 8: To build capacity at national and regional level to create and strengthen the policies for active ageing

The third priority area - promotion of active ageing in the areas of independent living involves measures to ensure the ability of elderly people to be as self-sufficient and independent as possible. This part of the document provides forms to promote healthy lifestyles, to improve the quality and accessibility of health services, improve prevention, as well as diversify social services for the elderly. Special attention is paid to financial literacy and financial independence of seniors, opportunities for social mobility and more.

Measures:

1. Healthcare and disease prevention
2. Improving living conditions
3. Improving the accessibility of transport
4. Promoting the supply of goods and services tailored to the needs of the elderly
5. Maximum degree of autonomy in long-term care





Priority 3. Proposal for Measures

Table 6. Proposals for specific measures per region - Priority 3

Priority 3: Promotion of active ageing in the independent living domain			
Measures	Main tasks per measure	Regional emphases - specific measures per region	Responsible institution
Measure 1: Healthcare and disease prevention	<ul style="list-style-type: none">• Providing services to the population living in small settlements in mountainous, semi-mountainous and remote areas. Ensuring conditions for equal access of seniors to medical and medico-social services.• Optimisation of outpatient and hospital networks based on the needs of the elderly.• Improving the interaction between public and private health sector and the rehabilitation	North-east region ➤ Increasing the role and expertise of various NGOs offering social services. Active cooperation between NGOs and the state in offering social services for the elderly. North-Central Region	MH, APD, NRA





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	<p>system, and closer cooperation between the system of health services and social protection system for the elderly.</p> <ul style="list-style-type: none">• Improving access to quality and safe drugs at affordable prices.• Financing and development of additional health services aimed at the elderly.• Raising awareness of the population of all ages in healthcare, health services and a healthy lifestyle. Increasing health awareness among the elderly.• Increasing the skills of elder people in care for themselves, prevention of disease and disability.• Continuation of existing national prevention programmes for the promotion of healthy lifestyles, and development of new programmes, with a particular emphasis on the elderly.	<ul style="list-style-type: none">➤ Clarifying the status of social assistants through a standard for their activities;➤ Developing a pricing system for social services at home;➤ Development of additional opportunities for preventive healthcare for the elderly. <p>Northwest region</p> <ul style="list-style-type: none">➤ Restoration of health offices in the settlements and provision of professionals;➤ Implementation of strategies for social services and inclusion of new services based on the needs of the elderly;➤ "Health on Wheels" in the form of	
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	<p>Establishment of national screening programmes for socially significant diseases.</p> <ul style="list-style-type: none">• Further training of healthcare providers for the elderly and improving the specialisation of the personnel in the field of psychological support and assistance for the elderly, as well as the main specialities of profiling in the field of geriatrics and gerontology.	<p>organised meetings with specialised doctors;</p> <p>➤ Self-help groups - elderly people in good health communicate and take care for other old people who are sick and helpless;</p> <p>➤ "Shared Kitchen" - providing food on a rotation basis in the settlements (villages/ hamlets);</p> <p>➤ Improving the habits and culture for independent living;</p> <p>➤ Adapting and improving infrastructure based on the needs of the elderly.</p> <p>Southeast region</p> <p>➤ Increasing the innovation and</p>	
<p>Measure 2: Improvement of living conditions</p>	<ul style="list-style-type: none">• Ensuring physical security, improvement of living conditions;• Ensuring incomes and reducing poverty among the elderly;• Promotion of public order and security;• Implementation of initiatives for improved safety of the elderly and prevention of crime• Improved road safety for the elderly;		<p>MLSP, MI, APD, NRA</p>





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Measure 3: Improving accessibility of transport	<ul style="list-style-type: none">• Providing accessible transportation and appropriate local infrastructure;• To monitor the satisfaction of the elderly by public transport and to adopt recommendations for optimisation;• Providing adapted transport services;• To support the design and construction of public spaces, suitable for seniors; To build urban environments adapted for the elderly (streetlights, pavements, walkways, recreational facilities).	<p>development of medicine in the field of active ageing and healthy ageing;</p> <p>➤ Opportunities for physical activity and sports activities.</p> <p>Southwest region</p> <p>➤ Improving conditions and encouraging physical activity for the elderly by initiating sports events - dancing, hiking, mountain hiking, etc.;</p> <p>➤ Timely prevention of the health status of the elderly;</p>	Municipalities, district administration
Measure 4: Promoting supply of goods and services adapted to	<ul style="list-style-type: none">• Developing and offering specialised products and services for the elderly• To support more flexible models for offering specialised services• To plan strategies at the local level to meet the needs of elder people	<p>➤ Developing social services available to seniors:</p> <ul style="list-style-type: none">- through providers- through grants and funding- through education and training- through family members, where	Municipalities, district administration



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the needs of the elderly		appropriate	
		<ul style="list-style-type: none">➢ Improving the financial literacy of elder people.	
		South Central Region	
		<ul style="list-style-type: none">➢ Support of physical activity and sports as a key component in ensuring independent life of the elderly;➢ Improving infrastructure and increasing mobile health services in small settlements;➢ Presence of the Ministry of Interior in small settlements to ensure the physical security of persons over 55;➢ Internship programmes for physicians and paramedics;➢ A national programme to attract doctors in remote areas;	
Measure 5 Maximum degree of autonomy in long-term care	<ul style="list-style-type: none">• Measures to improve long-term care for the elderly.• Improvement of existing and development of new guidance documents to improve the access and quality of health services.• Reducing poverty among the elderly.		MLSP, SAA, MH





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		<div><div>➤ Maintenance and prevention of health status of the elderly;</div><div>➤ Support for household and domestic activities and more affordable housing for seniors;</div><div>➤ More active media promotion of various sporting activities in which elder people can get involved.</div></div>	





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5.4. Priority area 4: Capacity building and creating active ageing enabling environment at national and at NUTS 2 level

To implement this strategy it is very important to have capacity available to all responsible parties, stakeholders and partners.

The need for joint action for integrated policy implementation, whereby various responsible government structures act together. Policies on population ageing should include both measures for the working life and measures to maintain the participation of elder people in society, including participation in decision-making in different volunteering activities, etc. In addition, stimulating activities /initiatives that may not relate directly to the working lives of elder people, such as research, networking, etc., will also contribute to the active ageing in the long run.

The operational objective, which is addressed in the programming of this priority, is:

Operational objective 8: To build capacity at national and regional level to create and strengthen the policies for active ageing

Operational objective 5: To promote the development of volunteering

The fourth **priority area - Capacity building and creating active ageing enabling environment at national and at NUTS 2 level** - is directly related to the other three priority areas. It covers both measures to improve the status and welfare of the elderly and institutional measures to strengthen the capacity of various institutions and stakeholders to promote active ageing. The purpose of this measure is to invest in human capital and opportunities for continuous improvement of policies aimed at the elderly. Measures in this priority area will support effective implementation of the main activities of the Strategy and will be the basis for sustainability of results and long-term increase of activity and reintegration of elder people.



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Ministry of Labour and Social Policy

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Measures:

1. Capacity building of institutions implementing policies for the elderly
2. Capacity building of stakeholders in respect of policies for the elderly
3. Continuous updating of policies for the elderly at local, regional and national level
 4. Improving attitudes towards elder people and anti-discrimination communication
 5. Improving monitoring and coordination
 6. Promotion of the strategy, communication and business at national and local level to engage in measures for active ageing



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Priority 4

Table 7. Proposals for specific measures per region - Priority 4

Measures	Main tasks	Responsible institution
Measure 1: Capacity building of institutions implementing policies for the elderly	<ul style="list-style-type: none">Improving the mechanism of coordination between the institutions that are relevant to active ageing policies;Improving coordination between institutions at central and regional level;Increasing the financial contribution at local level in terms of policies for active ageing;Providing training of institutional partners for life in the community and inclusion.	MLSP, MC, MMC, regional and municipal administrations, BRC
Measure 2: Capacity building of stakeholders involved in policies for the elderly	<ul style="list-style-type: none">Improving the mechanism of coordination between stakeholders that are relevant to policies for active ageingImproving the coordination of stakeholders between central and regional level;	Community centres, municipalities, district administrations,





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	<ul style="list-style-type: none">Increasing the financial contribution at local level in terms of policies of active ageing;Providing training to stakeholders living in the community and inclusion.	employers' organisations
Measure 3: Continuous updating of policies at local, regional and national level	<ul style="list-style-type: none">Coordination and monitoring of policies for active ageing;Update of policies with the participation of all stakeholders;Preparation and adoption of a law on volunteering;Review and proposals for updating the strategy papers on active ageing.	MLSP, MC, NGOs
Measure 4: Improving attitudes towards elder people and anti-discrimination communication	<ul style="list-style-type: none">Conducting an extensive communication campaign on active ageing;Review and discussion of the problem of elder abuse;	MES, trade unions and employers' organisations
Measure 5. Improving monitoring and coordination	<ul style="list-style-type: none">To mobilise the NSI capacity to track indicators of the strategy;To increase the capacity of all stakeholders to evaluate the implementation of policies;To encourage the creation of a network to collect data on	MLSP



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	polices for the elderly.	
Measure 6: Promoting the strategy, communication and business at national and local level to engage in measures for active ageing	<ul style="list-style-type: none">• Promoting and communicating the strategy and its measures among stakeholders;• Promoting stakeholder participation in projects aimed at active ageing;• Promoting PPP in terms of services and care for the elderly.• 	MLSP





6. FINANCING OF THE STRATEGY

Financial resources

The funding of the National Strategy for Active Ageing, developed on the basis of the National Concept of Active Ageing will be ensured through targeted funding from the state budget, EU funds, projects and programmes and other eligible external and internal sources.

7. COMMUNICATION PLAN AND PUBLICITY OF THE STRATEGY

The Plan for Communication and Publicity of the National Comprehensive Strategy for Active Ageing is to ensure awareness raising among the target groups for its vision, goals, priorities and planned measures.

Main objective

The main objective of the Plan for communication and publicity is to raise awareness as to the national comprehensive strategy for active ageing, to attract public interest, to encourage participation, to explain the opportunities for transparency and openness in its implementation.

The document aims to provide information to target groups at the national, regional and local level on priorities for active ageing and call them to action, taking into account the needs and specificities of the six regions. The Communication Plan seeks to promote communication and cooperation between different entities (regional/ local authorities, professional organisations, economic organisations, public associations, NGOs, etc.), and to improve their interaction at the national level.

Specific targets

1. To engage the public interest in and to raise public awareness as to the scope, objectives and results of the Strategy; to ensure maximum openness and



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transparency of the process of implementing the national comprehensive strategy for active ageing;

2. To encourage active participation of all stakeholders in the process of implementation of the Strategy.

Target groups

The activities for communication and publicity are aimed at three main target groups:

Table 8. Target groups of the *Plan for communication and publicity*

Target group 1: Internal target group
Target group 2: External target group
Target group 3: Target group - mediators

Target group 1: Internal target group - includes units of:

☐ the Ministry of Labour and Social Policy - the Strategic Planning and Demographic Policy Directorate, the Policy of the Labour Market and Labour Mobility Directorate, Policy for People with Disabilities, Equal Opportunities and Social Benefits Directorate, the Social Inclusion Directorate, the European Funds, International Programmes and Projects Directorate General;





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- ☐ the Social Assistance Agency - the Social Assistance Directorate General, the Social Assistance Directorates - 147 and Regional Directorates for Social Assistance - 28.;
- ☐ the General Labour Inspectorate Executive Agency;
- ☐ the Ministry of Finance, the Financing of Municipalities Directorate;
- ☐ the Ministry of Interior;
- ☐ the Ministry of Health;
- ☐ Regional health inspections;
- ☐ Centres for emergency care;
- ☐ the National Health Insurance Fund and the Regional Health Insurance Funds;
- ☐ the Ministry of Culture - regional expert consultancy centres - community centres
- ☐ the Ministry of Education and Science and the Human Resources Development Centre
- ☐ the National Support Unit of the electronic platform for adult learning in Europe;
- ☐ the Ministry of Youth and Sports;
- ☐ Regional and municipal management and administration.

Target group 2: External target group - persons over 55 and the general public together with the social partners

This target group covers the whole Bulgarian society. The relevant information and publicity is designed to build trust among citizens and to contribute to the awareness of the contribution of the Strategy for the development of active life of themselves or their relatives.

The Bulgarian society and social partners should be actively involved and should lend support in the implementation of measures under the relevant priorities. This group includes:



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- ☐ People aged over 55;
- ☐ Specific demographic and economic groups - economically inactive, employed, unemployed, and others.;
- ☐ Socially vulnerable groups - people in a disadvantaged position, people with disabilities and others.;

The communication and publicity plan pays particular attention to the group of social partners represented by organisations of workers, employees, employers and NGOs. In recent years, they proved to play a major part in determining and changing public attitudes on various topics because of the influence they can have.

Target group 3: Target group - mediators

To ensure successful communication and publicity of the Strategy, it is necessary to involve a group that will actually perform peer activity. It can include representatives of the following civil society structures:

- ☐ Trade and professional organisations, economic and social partners;
- ☐ NGOs;
- ☐ Media;
- ☐ Elected representatives at regional and local level, opinion leaders, politicians, IT departments within ministries and municipalities;
- ☐ Other associations/ organisations - NGOs, centres, non-profit associations and clubs, scientific, educational, training and cultural centres and institutions, civic associations, providers of social and health services, financial institutions, etc.

Basic principles of implementation of the Plan:

The communication plan will be implemented in line with the following basic principles:





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Equality - implementation of information and communication measures must provide equal access to information from all stakeholders and the general public;

Timeliness - all information and communication measures will be planned and implemented with a view to timely satisfying the identified needs of the target groups;

Adaptability - all information and communication measures will be tailored to the specific characteristics of both target groups and the specific situation in which they are fulfilled;

Partnership - all measures will be implemented in an open dialogue and interaction with all stakeholders, NGOs and associations and media;

Transparency - providing information on the implementation of information and publicity measures under national law;

Implementation of the communication and publicity plan

Communication tools

The choice of communication tools and activities in the implementation of the Plan should be consistent with:

- ☐ The specificities of the messages;
- ☐ The characteristics of the target group or subgroup - recipient of the message - such as size, communication channels to reach it;
- ☐ Possible activities and forms for communication.

When delivering messages that affect a range of different target groups and sub-groups, an integrated communication mix will be used to ensure effectiveness of communication, as well as activities and forms, as well as channels.





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Communication channels

The main communication channels that will be used in the implementation are as follows:

- ☐ Electronic media;
- ☐ Print media;
- ☐ Online media.

Basic communication activities:

- ☐ Advertising campaigns, including various communication channels and specific activities according to the target groups and specific advertising messages;
- ☐ PR campaigns and information campaigns involving different communication channels and specific activities according to the nature of the target groups and sub-groups;
- ☐ The information portal / website of the MLSP and other institutions relevant to policies for the elderly;
- ☐ Information events and other forms of conducting direct communication with target groups such as seminars, trainings, conferences, information days, meetings, roundtables and consultations with experts, presentations, meetings with opinion leaders, etc.

8. MONITORING SYSTEM AND EVALUATION INDICATORS

System of monitoring and evaluation indicators for the Strategy for Active Ageing

The system of monitoring and evaluation indicators for the Strategy for Active Ageing is based on best practices and experience and methodology used by the European Commission and the OECD, as well as the EVALSED guidance²⁰.

The indicators that will be used to monitor and evaluate the implementation of the strategy are included in the Active Ageing Index (AAI), which will be used as the primary evaluation

²⁰ http://ec.europa.eu/regional_policy/sources/docgener/evaluation/evalsed/guide/methods_techniques/rules_en.htm





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tool. The analysis for the needs of the strategy and the objectives and priorities are formulated in such a way that they comply with the indicators of the index.

The logic of the development of appropriate indicators corresponds to the understanding of the essence of both processes - monitoring and evaluation:

- The monitoring of the implementation of the plan is an ongoing activity that accompanies the process of implementation of the Strategy, which provides current control over the parameters of performance in order to respond to possible deviation from the plan;
- The evaluation aims to determine whether the objectives set out in the Strategy are achieved, the degree of achievement of the objectives (effectiveness) and the resources were used for this (efficacy).

Indicators of the overall Active Ageing Index

Priority 1: Promoting active ageing in the employment domain

(corresponds to area 1: Employment)

A. Employment rate for the age group 55-59

B. Employment rate for the age group 60-64

C. Employment rate for the age group 64-69.

D. Employment rate for the age group 70-74.

Priority 2: Promoting active ageing in the participation in society domain

(complies with area 2: Participation in society)

A. Volunteering activities: Percentage of population aged 55+ who performed unpaid volunteering activities through various organisations.

B. Care for children, grandchildren: Percentage of population aged 55+ who take care





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of their children / grandchildren (at least once a week).

B. Care for elder people: Percentage of population aged 55+ who take care of elderly or sick relatives (at least once a week).

D. Political participation: Percentage of population aged 55+ years who participate in activities such as meetings of trade unions, political parties or groups for political action

Priority 3: Promoting active ageing in the independent living domain

(complies with area 3: independent and safe life in good health)

A. Physical activity: Percentage of people aged 55 and elder who

do physical exercise or sports at least 5 times a week

B. Access to health and dental care: percentage of seniors aged 55+ who say that they have no unmet needs of medical and dental check-ups.

C. Conditions for Independent living: percentage of seniors aged 75 and more, living in private households or households of two people.

The **average disposable income:** the ratio of the median equalised disposable income of people aged over 65 to the median equalized disposable income of those aged under 65.

D. Elimination of the risk of poverty: percentage of people aged 65+ who are not threatened by poverty, where the poverty threshold corresponds to 50% of the national median equalized disposable income.

E. Elimination of serious material deprivation for the elderly: percentage of people aged 65+ who do not suffer severe material deprivation.

F. Physical security of the elder part of the population: percentage of elder people aged 55+ who do not feel at risk of becoming a victim of a serious crime.



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G. Lifelong learning: percentage of people aged 55-74 who received education or training in the four weeks preceding **the survey**.

Priority 4: Capacity building and creating active ageing enabling environment at national and at NUTS 2 level

(Building capacity and a favourable environment for active life)

A. Life expectancy at 55 years of age

B. Share of years of life in good health out of the life expectancy at the age of 55

C. Mental wellbeing

D. Use of information and computer technology

D. Social connectivity

E. Education level of the elderly.

Information resources and methods to obtain information for the purposes of monitoring, evaluation and update of the Strategy

The information required for the successful monitoring and evaluation is collected through a **system of indicators prepared and implemented in advance**, measuring results at the level of the measure and priority, and impact at the level of strategic objective.



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The collection of information for the support of the monitoring and evaluation system respectively can include combinations of the following sources:

- NSI and other relevant statistical data sources (data of agencies, data from international organisations generating such information regularly, etc.);
- Collection on a regular basis of updated data collected by the competent authorities at national and regional level;
- Own methodology (quantitative and qualitative), developed specifically to collect information during and after a project, including taking into account feedback from stakeholders.
- Methods developed specifically to collect information from organisations which partnered/ participated in / observed a project / activity.
- Information freely available through the data collection systems from social networks and other types of data freely available online.

Indicators of the general Active Ageing Index and

Institutions responsible for implementing policies in the following areas

Domain 1 EMPLOYMENT	Domain 2 PARTICIPATION IN SOCIETY	Domain 3 INDEPENDENT AND SAFE LIVING	Domain 4 ENABLING ENVIRONMENT
Ministry of Labour and Social Policy Employment Agency;	Ministry of Education and Science; Ministry of Youth	Ministry of Health; Ministry of Interior	Ministry of Labour and Social Policy Ministry of



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Ministry of Finance; National Social Security Institute; General Labour Inspectorate Regional and municipal authorities.	and Sports; Ministry of Culture; Regional and municipal authorities.	Ministry of Finance National Health Insurance Fund; Social Assistance Agency Regional and municipal authorities. Ministry of Transport	Health; Ministry of Education and Science; Ministry of Youth and Sports; Ministry of Finance; Ministry of Culture; Regional and municipal authorities; National Statistical Institute
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Entity responsible for management of the system for monitoring, evaluation and update of the Strategy

The coordinating body for monitoring and evaluation of the strategy will be the Ministry of Labour and Social Policy.

System for monitoring, evaluation and update of the Strategy

Monitoring and evaluation activities are an important element of the quality implementation of the Strategy. Their timely performance ensures that the implementation of the Strategy will follow its objectives, and in case of need necessary steps will be taken to update them to achieve the flexibility and sustainability of policies to external changes (e.g. change in the economic macro framework, legal framework at national and EU level, changes in the socio-economic environment, etc.) and/or internal factors.

Plans

The MLSP prepares annual progress reports on the implementation of the Strategy with recommendations on compliance of the objectives of the strategy with current needs and recommendations for the update.

Interim evaluation of the Strategy

The interim evaluation of the Strategy should take place at the beginning of the fourth year of its implementation. If the assessment results reveal substantial changes in the economic and social conditions in the country, amendments to related national legislation or EU legislation; significant changes in sectoral strategies and programmes affecting the implementation of the Strategy, an update can be proposed.

The final implementation report is drawn up by the MTC at the end of the planning period to take account of the implementation.

The final report should be promoted appropriately and all stakeholders and the public should be involved at the level of information collection, as well as the update of the objectives and priorities.





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Application of the principle of partnership and provision of information and publicity

The principle of partnership is one of the main mechanisms for the functioning of the European Union. The main requirement for the implementation of this principle is the active participation of civil society in the development, monitoring and evaluation of projects and strategic documents for development.

This principle implies different approaches for dialogue and consultation at local and national level to ensure joint participation of local and regional authorities, business and employers' associations, trade unions, NGOs and other stakeholders.

The involvement of stakeholders in the process of developing strategy includes three main components: information, consultation and joint decision.





Ministry of Labour and Social Policy

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