

## STRATEGIC DOCUMENTS OF REPUBLIC OF BULGARIA RELATED TO ACTIVE AGEING

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**ABSTRACT:** THE STRATEGIC DOCUMENTS ARE BASED ON THE VISION OF A FULL LIFE OF THE ELDERLY PEOPLE IN THE EUROPEAN AND NATIONAL COMMUNITIES, WITH RESPECT OF THEIR DIGNITY AND RIGHT OF CHOICE. DEVELOPMENT OF SOCIAL SERVICES FOR ELDERLY PEOPLE IS BASED ON THE PRINCIPLES AND CONCEPTS OF CARE FOR THE ELDERLY, AS SET FORTH IN THE GENERAL NATIONAL POLICY DOCUMENTS AND GUIDELINES FOR SOCIAL INCLUSION. FOR THE ELDERLY PEOPLE IN BULGARIA UNTIL NOW INDEPENDENT STRATEGIC DOCUMENTS HAVE BEEN ADOPTED (ONLY FOR THAT TARGET GROUP) AIMED AT THE IMPLEMENTATION OF POLICIES AND PROGRAMMES FOR THE SO CALLED ACTIVE AGEING. THE ANALYSIS OF THE BULGARIAN STRATEGIC DOCUMENTS LEADS TO THE FORMULATION OF THE PRINCIPLES ABOUT THE OLDER PEOPLE.

**KEY WORDS:** STRATEGIC DOCUMENTS, OLDER PEOPLE, ELDERLY PEOPLE, SOCIAL EXCLUSION, SOCIAL INCLUSION, RIGHT OF CHOICE

**THE** analysis of strategic documents focused on services and care for older people shows that they are an independent vulnerable group of the society, in most cases referred to as elderly people - all people over the age of 65. Active ageing has become a strategic notion of the common European policy on socio-economic development outlined in the Lisbon Strategy (2000) as a direct response to the demographic challenge of ageing population of the European Union. Active ageing policies are generally aimed at lifelong learning, extending working life, economic and social activity after the official retirement and longevity in good health.

**THE** strategic documents are based on the vision of a full life of the elderly people in the European and national communities, with respect of their dignity and right of choice. Protecting the dignity and improving the quality of life of the elderly could be achieved by providing quality, affordable and effective social services tailored to the real needs of the elderly. This protection is related to the formulation of clear and realistic objectives, the implementation of which will contribute to improving the quality of life of older people, prevention of social exclusion and achieving social cohesion.

**DEVELOPMENT** of social services for elderly people is based on the principles and concepts of care for the elderly, as set forth in the general national policy documents and guidelines for social inclusion. For the elderly people in Bulgaria until now independent strategic documents have been adopted (only for that target group) aimed at the implementation of policies and programmes for the so called active ageing. As a target group they are included into the "general" documents concerning other vulnerable groups. The main

documents defining the framework for the provision of social services for elderly people in Bulgaria are as follows:

### **1. NATIONAL STRATEGIC REFERENCE FRAMEWORK (2007 – 2013)**

**THIS** is the main platform for strategic reasoning and coordination of financial assistance under the Structural Funds, in particular Priority 2 – “Increasing the Quality of Human Capital with a Focus on Employment”. The focus of this priority is aimed at promoting a wide range of active policy programmes for the labor market, ensuring a close link between social protection system and policies for the labor market, the implementation of measures aimed at providing high quality social services for disadvantaged groups, improving the health status of the population and facilitating the access of poor and vulnerable groups to health services. For the improvement of the social protection system the focus of investment is directed towards bringing closer social services to users (community services), individual approach in the provision of social and health services and opening the social services system for the NGO sector and the availability of criteria and standards for the provision of social services. [4]

### **2. OPERATIONAL PROGRAMME “HUMAN RESOURCE DEVELOPMENT” (2007 - 2013)**

**THE** programme is a part of the National Strategic Reference Framework and its overall goal is to improve the quality of life, employment promotion, access to high quality education, lifelong learning and social inclusion. Its priority axes 5 and 6 consist of actions aimed at social inclusion and promotion of social economy to support vulnerable groups through the development of a network of social services supporting the further integration on the labor market and increasing the efficiency of the institutions on the labor market, social and health services including:

- ⇒ working out forms of social services provided in a family environment to dependent family members;
- ⇒ supporting the further development of social services provided in the already existing alternative forms;
- ⇒ encouraging the entrepreneurship for the development of a network of alternative social services for children and families at risk;
- ⇒ funding programmes that improve the quality of cares in the specialized institutions for children and adults, with a focus on social, training and labour-therapeutic work with their residents to prepare them for their integration in the community;
- ⇒ increasing the professional capacity and motivation of people involved in the field of social and health services/institutions, providers of social and health services/ as well as working out and implementation of systems to ensure upgrading knowledge and skills in compliance with the specific cares for the individual groups of users of social services;
- ⇒ introducing good management practices and activities of the institutions and the providers of social and health services [7].

### **3. OPERATIONAL PROGRAMME “ADMINISTRATIVE CAPACITY” (2007 – 2013)**

THE programme is a part of the National Strategic Reference Framework, as one of its objectives is improving the public administration performance to implement effective policies, quality services to citizens and businesses, and creating conditions for sustainable economic growth and employment [6].

#### 4. NATIONAL REPORT ON STRATEGIES FOR SOCIAL PROTECTION AND SOCIAL INCLUSION OF REPUBLIC BULGARIA (2008 – 2010)

A fundamental element of the Open Method of Coordination is the joint analysis and evaluation by the European Commission and Council of Ministers of the national reports on strategies. The first report presented by Bulgaria as a Member State was in 2008. The report was prepared under the guidelines of the European Commission, through which it aims to assist Member States in the process of reporting. The main objective of this report is to present the priorities in the carried out policies of social inclusion, pensions and health and long term care, which are the three elements of the Open Method of Coordination on social protection and social inclusion. In Part II of the report "National Action Plan for Social Inclusion 2008-2010" a critical analysis is made in quantitative and qualitative terms of the achieved progress in this policy in the last two years and the most pressing challenges in the policy for social inclusion are identified as it is paid attention to the need for consistency and continuity in the priority areas of activity. There are four main policy objectives of the National Action Plan for Social Inclusion 2008-2010:

1. **LIMITING** the intergenerational transmission of poverty and social exclusion (with a focus on child poverty and social exclusion). The more critical identified areas are: investment in early child development; responsible parenting; keeping the children at school; more purposeful support for the most vulnerable families; better reconciliation of personal and professional life; the reform in child care including through deinstitutionalizations; social services for child and families; monitoring of child poverty;

2. **ACTIVE** inclusion for the people furthest from the labour market. The more critical areas of action here are: development of the opportunities for employment of young people; activation of illiterate persons, persons without education and/or qualification, persons receiving social assistance benefits; activation of inactive and discouraged persons; ensuring adequate guaranteed minimum income by preserving the stimuli for participation in employment; social services for social inclusion of the persons furthest from the labour market, etc.

3. **EQUAL** opportunities for the most vulnerable groups of society with special attention to the people with disabilities (the vulnerable situation of children and adults with mental disorders living in the specialized institutions, the education of children with such disabilities, accessibility, employment and social economy, support, social services and home care, prevention of disability and rehabilitation, etc.); and Roma community (extending the multilateral approach, activation, integrated education and services, better living conditions, etc.) and equal opportunities between women and men;

4. **BETTER** management of the social inclusion policy as the main directions are: establishment of long-term strategy for social inclusion, establishment of advisory bodies on issues of social inclusion, structuring of activities for cooperation on social inclusion at local and regional level, increasing the administrative capacity, and the capacity of civil society to participate in the overall management cycle of the social inclusion policy, etc.

**ONE** of the most important features of the plan for 2008-2010 is that, along with the specific policy objectives for the period it clearly sets specific quantitative targets. They are generally in the area of poverty, income, education, employment, deinstitutionalization, community-based services, social assistance and social protection costs [1].

## 5. NATIONAL DEMOGRAPHIC STRATEGY OF REPUBLIC OF BULGARIA (2006 – 2020)

**THE** strategy is a fundamental document that formulates priorities and tasks in the demographic policy focused on slowing the population decrease rate, bringing about a stabilization trend in the long-run, and making possible the high quality of the human capital. According to the strategy one of its main priorities is “overcoming the negative effects of population ageing” as for its implementation the following measures and tasks should be undertaken: working out of policies for active ageing, adaptation of the social security system, the development of the system for social and health services and improving the quality of life of older people. In particular the tasks associated with the development of the system for social and health services and improving the quality of life of older people include activities such as: priority development of social services at home and in the community at the expense of services in institutions, improving the quality of life of elderly living in institutions, providing opportunities for recreation, sport, tourism, and participation in the cultural life of the elderly, the priority development of the training of social workers specializing in care for older people, promoting the participation of NGOs in care and provision of social services for the elderly.

**ANOTHER** independent direction in the strategy is “development of intergenerational solidarity” as the provided measures include: allocation of responsibilities associated with long-term care for the elderly, the active involvement of retired in voluntary networks of solidarity and care for the oldest people, development of schemes for the transmission of experience from older to younger, developing public awareness on the problems of the elderly [5].

## 6. NATIONAL PROGRAMME TO PROVIDE OPPORTUNITIES FOR ACTIVE AGEING, FULL PARTICIPATION OF PENSIONERS IN SOCIAL LIFE AND PREVENTION OF THEIR SOCIAL EXCLUSION (2009)

**THAT** programme was started in 2009 and was intended to continue up to 2011 however it was terminated in advance. Its main objective was to prevent social exclusion of pensioners and create opportunities for their continued active participation in social life after retirement. The specific objectives of the programme: ensuring equal access to services for the pensioners, providing opportunities for more active social life, providing conditions for healthy ageing and using the opportunities for development in the retirement age.

**THE** programme provided access for using its services by retirees over age 65 who can serve themselves. The programme was open for retirees who had non-assisted living, and for retirees who used social services in institutions for the elderly. Among the main target groups of the programme were:

- ⇒ retirees who used to receive allowances for heating during the previous year;
- ⇒ retirees using social services in institutions for the elderly.

**THE** programme was implemented through the provision of services for retirees for free complex social rehabilitation through: rest and relaxation, the organization of social and cultural programmes, organizing of workshops according to their interests, rehabilitation procedures, information on issues such as active ageing, healthy ageing, rights of the retirees and the opportunities to use them, etc. [3].

#### **7. NATIONAL CONCEPT ON PROMOTING ACTIVE AGEING IN BULGARIA (2012-2030)**

**THE** vision of the National Concept for Active Ageing is associated with the creation of conditions to ensure equal opportunities for dignified and fulfilling life. Every person age 50 and over 50 years is assumed to be an adult. However it should be taken into consideration that the general trend is to increasing this "limit" within the range of 60-70 years. The structuring of guidelines for action in the National Concept of Active Ageing is consistent with the basic directions and priorities of the European Union [2].

**THE** National Concept for Active Ageing is further development and continuation of one of the important directions of the National Strategy for Demographic Development of Republic of Bulgaria to 2030 - Overcoming the effects of population ageing. It states the aim for the establishment of conditions for economic growth, sustainable development of social systems, improving the standard and quality of life and building a cohesive society

**THE** center of the concept is the understanding that older people are an important and valuable resource of Bulgaria. They are entitled to a decent living and full participation in the community, a healthy and productive life, developing their knowledge, skills and abilities, equal treatment and protection of their basic human rights.

**ALL** Bulgarian citizens enjoy all the rights and freedoms promulgated in the Constitution of Republic of Bulgaria, the national laws and the international treaties in the field of human rights, to which Bulgaria is a party. Effective equality is achieved by applying the relevant provisions of the law, without distinction of age, sex, race, ethnicity, origin, language, religion, education, beliefs, political affiliation, and property, personal or social status.

**THE** Concept emphasizes that policy to support active ageing is part of the demographic policy as well as a part of the overall policies for sustainable cultural, economic and social development of the country. Sustainable development is a means of ensuring the welfare of Bulgarian citizens - both for those living today and for the future generations. Sustainable development could be established with a reasonable and balanced management of population, resources and environment.

**THE** National Concept for Active Ageing offers a specific perspective to address the consequences of the demographic ageing in the context of an integrated approach to addressing the specific characteristics of ageing.

**IT** is emphasized that the families of older people have the key significance to improving the living standards and quality of life of the elderly. According to research undertaken by the European Commission, a great part of older people prefer to live in an independent living environment or environment among their closest relatives. Therefore, improving the conditions of care for the elderly is becoming an important prerequisite for taking action to reconcile family and professional life. In modern intensive living conditions and dynamic labor market, families are subjected to greater responsibilities and workload in

terms of not only raising children, but caring for elderly parents too. It is also essential the policies to be bound in response to the population ageing with the overall process of development of society. The National Concept for Active Ageing should be consistent with the provision of opportunities and prospects in a more extensive period of human life and in the wider social context.

*The strategic objective of the National Concept for Active Ageing is to create conditions for active and dignified life of older people by providing equal opportunities for their full participation in the economic and social life of the community [2].*

THE ensuring of the real contribution of older people in the social and economic life and the full realization of their human rights and freedoms is related to the establishment of a society for all ages. In the contemporary conditions it is more and more of great importance not so much and not only the number of population but the development of human capital quality - education, health, social and labor mobility, skills and abilities, quality of life.

*FOR the implementation of the vision and the objectives of the concept the following operational objectives have been formulated [2]:*

- ⇒ *Operational objective 1* - Providing conditions for active working life of older people.
- ⇒ *Operational objective 2* - Providing financial stability of the pension system, conditions for active and dignified life in retirement and reducing poverty among retirees.
- ⇒ *Operational objective 3* - Providing conditions for access to health services and the extending the healthy life expectancy of older people.
- ⇒ *Operational objective 4* - Providing conditions for access to education, lifelong learning, training and re-qualification of older people for improving the mobility on the labor market.
- ⇒ *Operational objective 5* - Development and updating of long-term care and provision of conditions for access to social services. Development of the so-called "silver economy".
- ⇒ *Operational objective 6* - Development of volunteering.
- ⇒ *Operational objective 7* - Overcoming negative stereotypes and making a positive public image of the elderly.

*THE analysis of the Bulgarian strategic documents leads to the formulation of the following*

## PRINCIPLES ABOUT THE OLDER PEOPLE

### I. INDEPENDENCE

- ⇒ Older people should have access to enough food, water, adequate shelter, clothing and medical care by receiving income, support from the family and community and self-help.
- ⇒ Older people should be given the opportunity to work or access to other ways of generating income.
- ⇒ Older people should be able to participate in the resolution of issues about at what age and under what conditions to retire from active work.
- ⇒ Older people should have access to appropriate training programmes for them.
- ⇒ For the elderly people should be created living conditions that are safe, taking into account the specific characteristics and age-related changes.
- ⇒ Elderly people should be able to live at home as long as possible.

**II. PARTICIPATION**

- ⇒ Elderly people should remain integrated in society and participate actively in the development and implementation of programmes to improve their welfare, as well as initiatives that contribute to the sharing of experience and knowledge to younger generations.
- ⇒ Elderly people should be placed in a position to look for and develop opportunities to be useful for the community, as well as to be involved as volunteers in activities that correspond to their abilities and interests.
- ⇒ Elderly people should have the right to establish and participate in movements and organizations entirely for and by adults.

**III. CARE**

- ⇒ Elderly people should be ensured care in the family and community, as well as adequate protection in accordance with the cultural values of any social system.
- ⇒ Elderly people should have access to medical care, to maintain their optimal physical, mental and emotional condition, as well as to prevent the onset of various diseases.
- ⇒ Elderly people should have access to social and legal services to enhance their independence, protection and quality of the existing care.
- ⇒ Elderly people should have access to all levels of support provided by the state, rehabilitation and social services in a humane and safe environment.
- ⇒ Elderly people should be aware of and protect the human rights and fundamental freedoms they have, regardless of the location, medical or other facility, including full respect for the dignity, beliefs, needs and privacy and their right to make decisions affecting their quality of life and provided care.

**IV. SATISFACTION**

- ⇒ Elderly people should be given the opportunities to fully realize their potential.
- ⇒ Elderly people should have access to educational and cultural activities of the community, as well as suitable conditions for recreation.

**V. DIGNITY**

- ⇒ For elderly it should be create conditions to live in dignity and safety and not to be subjected to any kind of exploitation, physical or mental abuse.
- ⇒ Elderly people should be treated fairly regardless of age, gender, race or ethnic origin, disability or other qualities and should be evaluated independently for their contribution to society.

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