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ACTIVE POLICIES TO PROMOTE ACTIVE AGING AND ADDRESS DEMOGRAPHIC CHALLENGES IN BULGARIA

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Ключові слова: старіння, активне старіння, охорона здоров'я, соціальна інтеграція, економічне зростання, демографічні зміни, управління охороною здоров'я

Abstract. Active policies to promote active aging and address demographic challenges in Bulgaria. Vazova T., Stasiuk Y. The article explores the concept of active aging in Bulgaria, emphasizing the economic, social, and health benefits of implementing policies aimed at older adults. In light of the rapid population aging, Bulgaria faces significant demographic challenges impacting its economic, social, and health systems. The primary objective of the research is to analyze the strategic framework and active aging policies at both national and regional levels, focusing on their effects on the quality of life, health status, and social integration of the elderly. This study uses a mixed methods approach integrating both quantitative and qualitative analysis to assess the economic and social impact of active aging policies in Bulgaria. This approach combines quantitative data that provide objective measurements of current status with qualitative analyzes that provide an in-depth understanding of the context and impact of existing programs. Through this approach, the research aims to provide a basis for formulating specific and effective recommendations to improve policies and programs in the field of active aging and healthy living of the elderly. This multi-layered approach will provide a basis for future research and policies aimed at improving the quality of life of older people, emphasizing the importance of active aging and healthy lifestyles in the context of dynamically changing social and economic conditions in Bulgaria. Active aging is linked to numerous benefits, such as improved health outcomes, increased social engagement, reduced poverty, and enhanced economic productivity. By fostering an active lifestyle and improving access to health and social services, the pressure on Bulgaria's healthcare system is alleviated. However, challenges persist, notably insufficient coordination among institutions and a lack of integrated policies. The article concludes with specific recommendations for enhancing existing programs, including the establishment of a central coordinating body for active aging policies, ensuring sustainable funding for health and social services, and implementing innovative strategies such as digital learning for promoting healthy lifestyles and chronic disease prevention. These measures aim to enhance the socio-economic and health conditions of the elderly in Bulgaria while supporting overall economic growth.

Реферат. Дієві політики для сприяння активному старінню та вирішення демографічних викликів у Болгарії. Вазова Т., Стасюк Ю. У статті досліджується концепція активного старіння в Болгарії, підкреслюються економічні, соціальні та медичні переваги впровадження політик, спрямованих на людей похилого віку. З огляду на швидке старіння населення, Болгарія стикається з істотними демографічними викликами, що впливають на її економічну, соціальну та медичну системи. Основною метою дослідження є аналіз стратегічної основи та політик активного старіння на національному та регіональному рівнях з акцентом на їхній вплив на якість життя, стан здоров'я та соціальну інтеграцію літніх людей. У дослідженні використано змішаний підхід, що інтегрує кількісний та якісний аналіз для оцінювання економічного та соціального впливу політик активного старіння в Болгарії. Цей підхід поєднує кількісні дані, які забезпечують об'єктивні вимірювання поточного стану, з якісним аналізом, який надає глибше розуміння контексту та впливу наявних програм. Завдяки цьому підходу дослідження спрямоване на створення основи для формування

конкретних та ефективних рекомендацій щодо покращення політик і програм у сфері активного старіння та здорового способу життя літніх людей. Такий багаторівневий підхід забезпечить основу для майбутніх досліджень і політик, спрямованих на покращення якості життя літніх людей, підкреслюючи важливість активного старіння та здорового способу життя в умовах динамічно змінюваних соціальних та економічних умов у Болгарії. Активне старіння пов'язане з численними перевагами, такими як покращення результатів у сфері здоров'я, підвищення соціальної активності, зменшення рівня бідності та підвищення економічної продуктивності. Завдяки сприянню активному способу життя та покращенню доступу до медичних і соціальних послуг знижується навантаження на систему охорони здоров'я Болгарії. Проте існують виклики, зокрема недостатня координація між установами та відсутність інтегрованих політик. У статті подаються конкретні рекомендації щодо вдосконалення наявних програм, включаючи створення центрального координаційного органу для політик активного старіння, забезпечення сталого фінансування медичних і соціальних послуг, а також упровадження інноваційних стратегій, таких як цифрове навчання, для сприяння здоровому способу життя та профілактики хронічних захворювань. Ці заходи спрямовані на покращення соціально-економічних і медичних умов життя літніх людей у Болгарії та підтримку загального економічного зростання.

Active aging is a concept that is gaining increasing importance in modern societies characterized by significant demographic changes and population aging [1, 2]. In Bulgaria, as in many other developed countries, this process poses serious challenges to the economic, health and social system [3, 4, 5]. The main idea of active aging is to promote the full participation of older people in economic, social, health, cultural and civic activities that maintain and improve their health and quality of life. This includes flexibility in lifestyle choices through studying, working, volunteering, caring for others and maintaining a healthy lifestyle.

In this context, similar to how organizational culture can influence strategic development and resilience in businesses [6], active aging strategies in national policy frameworks can also contribute to systemic sustainability [7]. The purpose of the study is to analyze the strategic frameworks and policies for active aging at the national and regional level in Bulgaria, emphasizing their impact on the quality of life, health status and social integration of the elderly. The research focuses on the economic and social benefits of active aging policies, including health policies that promote healthy lifestyle. The aim is also to propose specific recommendations for improving existing programs and measures related to the health and social integration of the elderly in order to improve their quality of life and ensure sustainable development of the health system. The concept of active aging has been the subject of extensive research in the last two decades and has become a major objective of European policies to meet and respond to the challenges of population aging [8]. Active aging policies in Bulgaria and other Central and Eastern European countries aim to address the challenges of an aging population by promoting health, employment and social participation among older people. These policies are aimed at preserving the work potential of pensioners through mentoring programs [17], developing active social policies to support

employment and labor market integration [10, 11], since special importance in this process is given to patient orientation during the period of healthcare system reform [12, 13]. Analyzing the strategic framework, policies and programs implemented at the national and regional level, it is examined how these measures contribute to improving the quality of life of the elderly, as well as and to achieve sustainable economic growth and social integration.

The article examines the theoretical concepts necessary for leading an active life, strategic documents and policies, as well as specific programs for employment and social inclusion. Health promotion programs aim to prevent chronic diseases and reduce disability in old age, while social sector strategies emphasize older people's participation and service development [5]. Through a detailed analysis of data on economic activity and unemployment among the elderly for the period 2012-2023, the main trends and results of the implemented policies have been identified. In addition, the article highlights the social and economic consequences of poverty for older people and offers recommendations for improving existing programs and measures.

MATERIALS AND METHODS OF RESEARCH

The research was conducted with a combined method, which includes quantitative and qualitative analyses, in order to evaluate the economic and social benefits of active policies for active aging of the elderly in Bulgaria. The research methodology is structured to provide a comprehensive understanding of the impact of various factors on the quality of life of the elderly and to offer specific guidelines for improving policies in this area.

The data are extracted from national and European statistical sources, mainly from the National Statistical Institute (NSI) and Eurostat. Indicators related to levels of employment, unemployment, poverty, health status and demographic data covering the period from 2012 to 2023 were analyzed. A period

has been chosen that reflects significant demographic and economic changes in Bulgaria, providing the necessary context for the analysis of active aging.

Specific search queries were formulated to target information related to economic activities, unemployment statistics, poverty rates among the elderly, and policies that address active aging. The study covers strategic documents at national and international level, including the National Strategy for Active Living (2019-2030), the Lisbon Strategy and the International Action Plan on Aging (Madrid, 2002). These documents provide a framework for understanding strategies and initiatives that promote active aging.

In the research process, various primary sources were used and analyzed, including statistical data and reports from governmental and international organizations, as well as documentary evidence of policies related to active aging in order to draw conclusions from the research.

The inclusion and exclusion criteria are as follows: data and documents that are directly related to active aging policies, employment, social integration and health services for older people are included, as well as strategic frameworks that have been active in the period from 2012 to 2023 and which are relevant for the demographic trends in Bulgaria. Older documents or policies not directly related to the current context of active aging were excluded, as well as studies that did not have robust empirical data or were not applicable to the specific demographic groups (aged 55-64 and 65+).

Quantitative analysis is focused on data of factors that influence health status, economic activity and unemployment among older people, with the aim of assessing trends and correlations between indicators. The data were analyzed in the context of different age groups, with an emphasis on the 55-64 and 65+ age groups. A Microsoft Office 2016 Professional Plus with license number 26VHQ-7NY4T-YW2WQ-7GTQH-6VXRB was used to build graphs and table calculations. The statistical methods used include the calculation of percentage shares, average values and correlations, which allows obtaining reliable and valid conclusions about the dynamics of the activity of the elderly in the market of labor.

RESULTS AND DISCUSSION

The qualitative analysis was carried out on strategic documents and policies in order to identify the main approaches and measures applied in Bulgaria to support active ageing. In this context, successful examples from practice, as well as challenges faced by older people in the process of integration into society and the labor market, are examined. Emphasis is also placed on the health status of the elderly, taking into

account the impact of chronic diseases, physical activity and access to medical services on the quality of life of this population group.

The results of the analysis conclude with recommendations for improving policies and programs for active aging based on the identified trends and the impact of socio-economic factors on the elderly population. According to the data, the relative poverty rate among the elderly has fluctuated significantly, peaking at 33.3% in 2020 before falling to 20.9% in 2023. The participation of the working-age population among the elderly (aged 55-64) has grown significantly over the years, indicating a positive trend towards active participation in the labor market.

The research provides important guidelines for active aging policies, promoting the integration of older people in society and the economy and highlighting the importance of preventing health problems and social isolation.

Theoretical concepts of "elderly and old people" and "active living"

Theoretical concepts [14, 15] of adults and old people provide the basis for understanding psychosocial development through the different stages of adulthood, offering an important framework for analyzing the changes that occur in the different phases of a person's life. According to the theories, maturity can be distinguished into three main stages: early maturity (20-40 years); middle maturity (40-65 years); late maturity (65 years to death).

Most developed countries in the world accept the chronological age of 65 as the definition for an "old" person and, like many Western concepts, this adapts well to the situation in Bulgaria. This definition is somewhat arbitrary, but this age at which a person can begin receiving pension benefits is already considered retirement age [16]. Although the current retirement age in Bulgaria is lower than 65 years and is different for men and women, the Social Insurance Code provides for its gradual increase to 65 years for both men and women after 2037 [17].

The current study covers two main age groups of individuals: 55-64 years and 65 and over. The reason for this is that in Bulgaria people over 55 years of age are listed as one of the priority target groups of the active policy [18]. These individuals are less competitive in the labor market due to various factors such as outdated skills, health problems, age discrimination, etc.

Based on the analysis and research of Bulgarian and foreign sources in order to clarify the basic definitions, the following definitions have been adopted for adults and the elderly.

Adults are individuals whose development and physical condition are in the period between youth and old age. This period usually begins after the end

of adolescence (18-20 years) and continues until reaching adulthood (65 years). Elderly people are individuals who have reached a certain age threshold, which is usually associated with physical or medical limitations due to the natural processes of aging. This period usually begins after 65.

The prevention of physical and health ailments in this age group is key to maintaining a good quality of life and independence and is related to active ageing, which is related to the concept of "active senior living".

In the 1990s, the concept of active aging started to develop, underlining in particular, the active role of the elderly in society. However, different from the concept of successful aging, active aging emphasized the need to account for optimization of opportunity structures and the enabling environment [19]. In the European context, the concept of active aging emphasizes a multi-layered policy-oriented model in which active aging at all stages of the life course is emphasized with the well-being of older people at its core [20, 21].

The European Commission formulated the parameters of "active life of older people" for the first time in 1999, with subsequent definitions representing a wide range of approaches and emphases, from economic and social contribution to healthy lifestyles and independence. For the purposes of this article, the following definition of active living is used:

Active living of the elderly and old means participation in economic, social, cultural, spiritual and civic activities that maintain and improve their health and quality of life. This includes flexibility in lifestyle choices through education, work, volunteering, caring for others, and maintaining a healthy lifestyle, with the goal of extending periods of activity and independence. Active living promotes social integration and recognizes the potential of older people to contribute to society.

Active aging and demographic changes in Bulgaria

Bulgaria is facing serious demographic challenges related to the aging of the population and the reduction of the total number of inhabitants [7]. The aging of the population is not an isolated case in Bulgaria, it is a pan-European process [22], but according to selected demographic parameters, Bulgaria is classified as one of the ten most outdated European countries [23]. In 2023, the percentage of people aged 65+ compared to those aged 15-64 is 33.9%. This indicator is constantly increasing and is expected to reach 59.6% in 2060, which means that for every two people of working age there will be almost one pensioner. In 2070, this figure will drop to 55.1%, but still remains significantly high, highlighting the growing strain on the labor market, pension system and healthcare (Table 1) [24].

Table 1

Age structure of the population of Bulgaria, 2023-2070

Year	Age groups as a percentage of the total study			Population 65+, as a percentage of the population aged 15-64	Average life expectancy in years	
	0-14	15-64	65+		men	women
2023	14,8	63,6	21,6	33,9	71,1	78,2
2030	13,7	63,1	23,2	36,8	73,4	80,1
2040	13,1	60,4	26,5	43,9	76	82,3
2050	13,6	56,2	30,2	53,8	78,5	84,2
2060	13,3	54,3	32,4	59,6	80,7	86
2070	13,3	55,9	30,8	55,1	82,8	87,7

The increasing share of people over 65 in the working age population puts significant pressure on the labor market, the pension system and healthcare. In 2060, almost every second person of working age is expected to support one pensioner, which will require serious reforms and innovations in the country's social, health and economic policies. Despite the slight improvement of this indicator until 2070, Bulgaria will continue to be faced with the need to optimize

resources and integrate the elderly into social and economic life. Effective active aging policies that promote healthy lifestyles and social engagement will be key to addressing these challenges and ensuring sustainable economic development.

Legislative basis for implementing active policies in Bulgaria

In 1999, the European Commission's Communication "Towards a Europe for All Ages" emphasized

the importance of the aging population. The paper examines the shrinking and aging working population and the need to adapt both public financial systems and social protection and health care systems. Attention is drawn to the increased needs of the elderly and the need for measures to prevent social exclusion and poverty.

The importance of developing policies regarding an aging workforce is reflected in the Lisbon Strategy, which emphasizes the importance of policies for an aging workforce, prevention of early retirement and modernization of social protection.

The European Commission and the United Nations (UN) are developing key policy documents that play a significant role in shaping policies related to population ageing. These policies align with international initiatives like the UN's Madrid Plan for Active Aging and EU commitments to integrate older people's needs into national policies [9]. This plan outlines the main goals and measures needed to address population ageing. The plan calls for a change in attitudes, policies and practices at all levels and in all sectors. The main objective is to fully utilize the potential of the aging population by providing dignified old age and meeting the needs of all people in this group.

The main areas for the implementation of the plan (health care and social services, reduction of poverty among the elderly, provision of opportunities for participation in public life and the labor market) are also laid down in Bulgaria's policy in relation to active aging. A number of challenges in this area are reflected and resolved in the active policy of Bulgaria, related to legislative measures and strategic documents.

The main normative documents in the country related to active aging aim to ensure that this group of society will live with dignity, receiving the necessary support and services.

The **Constitution of the Republic of Bulgaria** [29] lays the foundations of the welfare state, establishing the principles of social justice, equality and the protection of human rights.

The **Health Act (2005)** [26] regulates the basics of public health care and defines the rights of citizens to access health care, prevention, diagnosis and treatment. This law also includes provisions for healthy lifestyles and disease prevention, which is key to active aging and maintaining good health among older people, and the **National Health Strategy (2030)** [27] is a key document that sets the priorities and targets for the development of healthcare in Bulgaria. It includes measures to improve access to quality health services and emphasizes the importance of disease prevention, especially among the elderly. The strategy promotes healthy lifestyles, prevention of chronic diseases and

access to rehabilitation, which is essential for active ageing. It also includes measures to reduce inequalities in health care, which is particularly important for vulnerable groups such as the elderly.

The **Social Services Act (2019)** [28] creates a framework for the provision of social services aimed at improving the quality of life of vulnerable groups, including older people. It regulates the conditions and procedures for access to social services, as well as the types of support that can be provided to facilitate social integration and independent living for older people, and the **National Strategy for Long-Term Care (2014) and Action Plan for the period (2022-2027)** [29] aims to develop a sustainable and effective model of social services and care for elderly people who cannot manage independently. The strategy aims to create conditions for dignified aging through integrated care, which includes health and social services provided both in a home environment and in specialized institutions. It emphasizes the need to promote the independence and social integration of the elderly by proposing solutions to improve the quality of long-term care and ease the burden on families.

The **Employment Promotion Act (2001)** is a priority and plays a key role. It includes measures to stimulate the employment of older people through financial incentives for employers and training and retraining programmes, and the National Employment Action Plan aims to increase employment, improve the quality and productivity of labor and annually since 2001 presents the specific projects, programs and measures with specified objectives, main activities, target groups (people over 50 are specified as one of the target groups in a disadvantaged position on the labor market), subsidies for employers, financial resources and expected results of their implementation.

National Employment Action Plan [30] aims to increase employment, improve the quality and productivity of labor and annually since 2001 presents the specific projects, programs and measures with specified objectives, main activities, target groups (people over 50 are specified as one of the target groups in a disadvantaged position on the labor market), subsidies for employers, financial resources and expected results of their implementation. **The Employment Strategy (2021-2030)** [31] of the Republic of Bulgaria is also emerging as a key strategic document defining the tasks and directing the efforts of all interested parties in the labor market, focusing on policies that encourage the elderly's labor market participation, linking it to improved quality of life through economic growth and enhanced self-confidence [32].

The Social Insurance Code [33] sets out people's right to pensions and social security, ensuring the financial protection of the elderly. This code regulates

the conditions for acquiring the right to a pension, as well as the additional social insurances that contribute to financial stability and security at retirement age.

The National Strategy for Active Living (2019-2030) [34] focuses on promoting active and independent living for older people through an integrated approach that combines health, social and economic policies. The strategy aims to support older people to remain active members of society by providing them with opportunities for continued participation in the labor market, volunteering, as well as educational and cultural activities. The strategy emphasizes the importance of social engagement and long-term health as key factors in improving the quality of life of older people and reducing social isolation. The strategy also uses the *Active Living Index (AAI)* - described above, as a tool to measure the unused potential of the elderly for active and healthy aging at the national and regional level. It measures the level at which older people live independently, participate in paid employment and social activities, and their ability to age actively.

These national strategies, in combination with the laws, create a complex legal and strategic framework that provides the necessary support for older people in Bulgaria. They contribute to the development of policies that promote active ageing, improve access to health and social services and stimulate their social and economic integration.

Provision of health and social services to support active aging in Bulgaria

Poverty is one of the social determinants of health, and according to the World Health Organization it is a decisive factor in health risk [35]. Its influence on individual and public health is multidirectional. Bulgaria is among the countries with the highest

income inequality in the EU and with the highest share of people at risk of poverty or social exclusion.

The share of Bulgarians who are declared to be in good health is the same as the average for the EU, but there are significant differences according to income.

In 2022, 68% of Bulgarians said they were in good health – the same percentage as the EU average. However, the difference in terms of the created income is greater: Bulgarians in the quintile with the highest income, who defined their health status as "good", are 84%, and those in the quintile with the lowest income - 53%; in the EU, these shares are 79% and 58%, respectively. The gender gap is also slightly above the EU average: 72% of men and 65% of women say they are in "good" health, compared to 70% and 65% in the EU, respectively [36].

Life expectancy in Bulgaria is relatively low compared to other EU countries (in 2023 – 75.8 years compared to the EU average of 81.5 years, according to data from the European statistical service Eurostat), due to poor health habits, with the greatest importance given to smoking, low physical activity and unhealthy diet, as well as high rates of chronic diseases (cardiovascular, diabetes, etc.). Bulgaria remains the EU country with the lowest life expectancy. The rates of preventable mortality through good prevention and prophylaxis and the mortality rate preventable through good treatment are among the highest in the EU. In 2020, the mortality rate preventable through good prevention and prophylaxis was 316 per 100,000 population, while the EU average was 180. In 2020, the mortality rate in Bulgaria preventable through good treatment was 213 per 100,000 population, which is more than twice the EU average (92 per 100,000 population) (Fig. 1) [36].

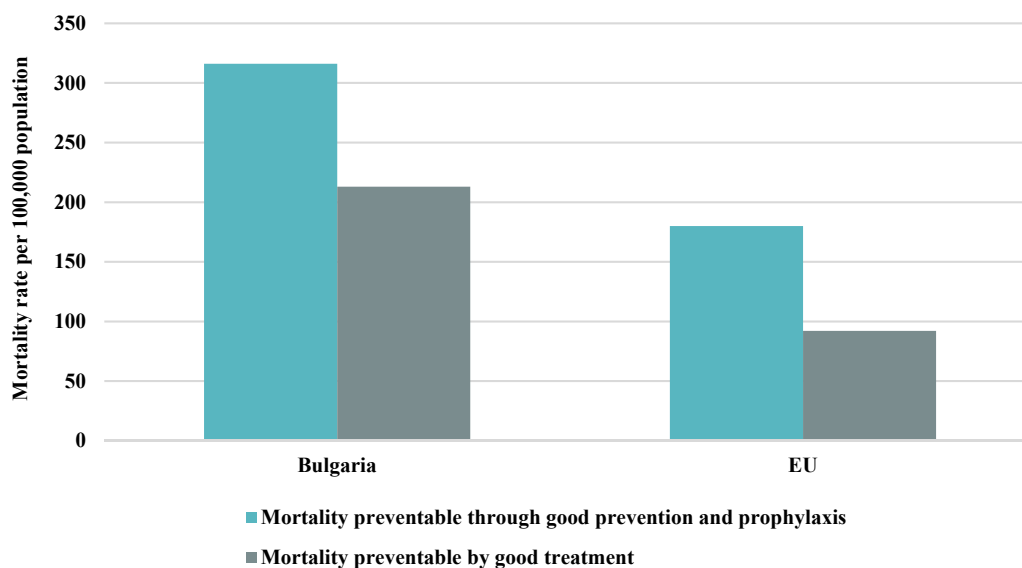


Fig. 1. Mortality rate per 100,000 population (2020)

A large proportion of deaths in Bulgaria are due to behavioral risk factors or environmental risk factors (Table 2) [36].

The problems in the eating habits of the Bulgarian population are particularly worrying in the context of the health consequences resulting from unhealthy

eating. Inadequate intake of fruits and vegetables leads to a lack of important vitamins, minerals and antioxidants. Overweight and obesity seem to be largely responsible for the occurrence of chronic diseases, reduce the change of life and worsen its quality [35].

Table 2

Mortality associated with behavioral risk factors

	Risks related to the diet	Smoking	Alcohol	Low physical activity	Air pollution
Bulgaria	29%	18%	7%	2%	9%
Europe	17%	17%	6%	3%	4%

The harmful effects of smoking and alcohol are a major risk factor for the development of lung disease, cancer (especially of the lung, throat and oral cavity) and cardiovascular disease. The high rate of deaths related to smoking indicates the need for stricter measures to control the use of tobacco products, as well as the promotion of smoking cessation campaigns. The National Programme for Prevention and Control of Non Communicable Diseases (NP-NCD) [37] includes measures to limit smoking by banning smoking in public places, placing restrictions on the sale of tobacco products to minors, limiting tobacco product advertising, and placing warning images on cigarette packages.

Insufficient physical activity is associated with a higher risk of cardiovascular disease, obesity, type 2 diabetes and musculoskeletal problems [38]. Physical activity is extremely important not only for maintaining a healthy weight, but also for improving mental health and preventing chronic diseases [39]. This underscores the benefits of physical activity in promoting healthy aging, which contributes to overall well-being and social engagement among older adults [40]. The National Strategy for the Development of Physical Education and Sports (2012-2022) [41] has an important role in promoting healthy behavior and prevention among individuals. Underscore the benefits of physical activity in promoting healthy aging, which contributes to overall well-being and social engagement among older adults. It is aimed at promoting physical activity among all age groups, including those over 65. Air pollution is a significant factor in mortality and morbidity from cardiovascular disease, respiratory disease and some cancers. In response to these problems, Bulgaria is developing a National program for the improvement of atmospheric air (2018-2024) [42].

Diseases caused by factors related mainly to people's behavior, defined as "diseases of social importance" (circulatory diseases, malignant tumors, chronic

respiratory diseases and diabetes) have a much higher incidence and mortality compared to those in the EU. They have an unfavorable trend and affect a significant part of the active-age population (Fig. 2) [43].

The graph shows the dynamics of the main causes of death in Bulgaria for the period 2010-2023. Cardiovascular diseases (especially ischemic heart disease) remain the leading cause of death in Bulgaria, which is an indicator of the need for more effective health policies aimed at prevention and early detection. Endocrine and metabolic diseases, including diabetes, also play an important role in overall mortality. This highlights the need to increase health culture regarding healthy eating and physical activity. Diseases of the respiratory system and various types of cancer also contribute significantly to mortality and require targeted efforts for early diagnosis and treatment.

These observations emphasize the need for a comprehensive approach in the health system, which includes prevention, improving access to health services, as well as measures to reduce risk factors such as smoking, unhealthy diet and low physical activity.

The main causes of mortality in Bulgaria, indicated above in the text, emphasize the need for strategic investments in health care. To ensure better access to health services in the long term, investors should focus on building modern medical centers in economically backward regions, improving the infrastructure for access to specialized care and expanding telemedicine. Funding mobile health teams and home care services will ensure more equitable access to health care, especially for vulnerable groups and remote areas. These investments are key to reducing regional disparities and ensuring a more sustainable health system.

In the coming years, investments in the health sector in Bulgaria will increase significantly thanks to



the Recovery and Resilience Plan and the EU Cohesion Policy. Bulgaria will receive 6.9 billion euros through the Recovery and Resilience Mechanism, which represents 9.7% of the country's GDP. Of these funds, approximately 5.4% (€371.55 million) are earmarked for healthcare. The main priorities include modernization of hospitals, treatment of cerebrovascular diseases, establishment of an air ambulance system, outpatient clinics in remote areas, e-health and modernization of psychiatric care [36].

These investments will be complemented by the EU approximation program for the period 2021-2027, which will add another €219.8 million to the health system, with a focus on health infrastructure and medical equipment. At the beginning of 2023, a National Map for the long-term needs of health services was adopted, with the aim of directing future investments towards more equitable and sustainable

regional development and improving access to health care in the long term. This measure is in line with the National Health Strategy 2021-2030 and the reform program set out in the National Recovery and Resilience Plan. An additional card is currently being implemented that will determine access to pharmaceutical services [36]. In addition, the Ministry of Health and several regions are launching the "Doctors in Small and Remote Settlements" project, which provides health services from district hospital specialists to residents in underserved regions. The initiative will be expanded under the Recovery and Resilience Plan by establishing outpatient practices with doctor and nurse teams in small communities. This highlights the need for health promotion programs that enhance the well-being of older adults, emphasizing social participation and the creation of an elderly-friendly environment [5].

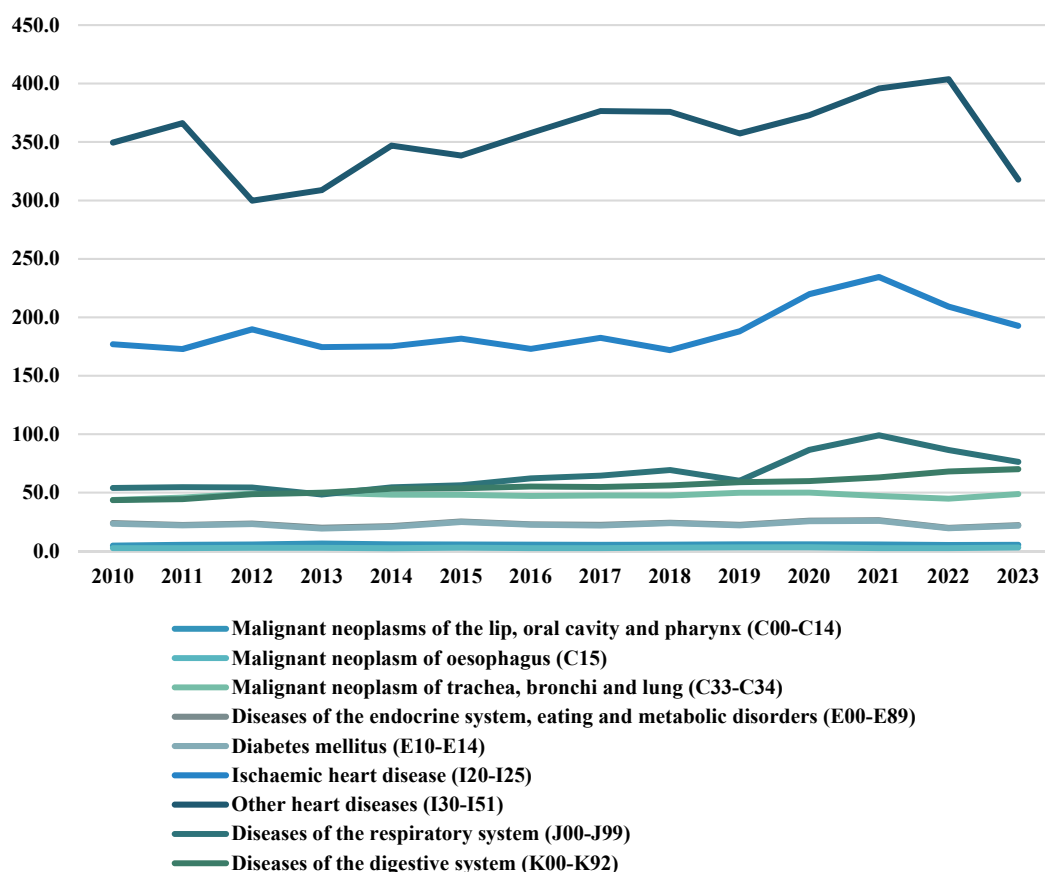


Fig. 2. Causes of Death in Bulgaria (2010-2023)

The development of social services in Bulgaria is supported by significant investments along the lines of the Recovery and Sustainability Plan and the EU cohesion policy. Through these significant investments, Bulgaria directs its efforts not only to the modernization of health structures, but also to the

development of social services, which play an essential role in the care of vulnerable groups.

There is a tendency to reveal new and increase the capacity of already revealed social services in Bulgaria during the period 2021-2023. On the one hand, this process is closely related to the efforts for

deinstitutionalization, with the aspiration to move from institutional to community models of support and care for various vulnerable groups in society, including the elderly and senior people. On the other hand, the need to adapt and develop alternative community models of support and care was further highlighted by the COVID-19 pandemic. The restrictions imposed by the pandemic, such as the isolation of people in institutions and the need to create safer and more sustainable alternatives, accelerate this process. The COVID-19 pandemic, increased mortality among the elderly, and the adopted policy of deinstitutionalization of care make community and home-based services an even better alternative for social service delivery.

Elderly and senior people housed in specialized institutions were facing serious problems and challenges during the pandemic. In these institutions, users were deprived of the possibility of self-isolation and are often exposed to the risk of infection. The pandemic was accelerating the understanding that

community and home-based services are more flexible and effective in crisis situations. They also contribute to maintaining social contacts and preventing isolation, especially among the elderly.

The introduced changes in the system of social services in Bulgaria during the period 2019-2020, related to the adoption of the Law on Personal Assistance and the Law on Social Services and the introduction of the "Personal Assistance" mechanism and the "Assistant Support" service, are a step towards increasing access to social services in a home environment.

The introduction of the personal assistance mechanism in 2019 is a significant step towards supporting and expanding the scope of social services provided in Bulgaria for the elderly and senior people.

The number of users of the personal assistance mechanism has been growing steadily over the past years, as a result of the wide coverage and the availability of more resources to provide these services (Fig. 3) [44].

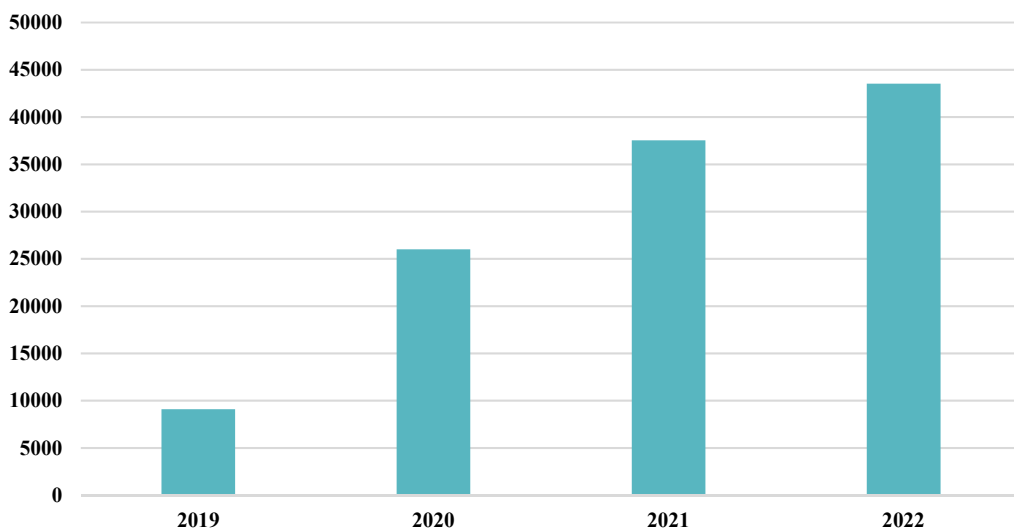


Fig. 3. Number of users of the "Personal Assistance" mechanism

At the beginning of 2021, the provision of the "Assistant Support" social service was launched as an activity delegated by the state with funding from the state budget. The service includes assistant support for: self-service; motion and locomotion; changing and maintaining body position; performance of daily and household activities; communication.

According to data from the Social Assistance Agency, in 2021 the number of subsidized users was 14,343, in 2022 it increased to 14,779, in 2023 it reached 16,239, and in March 2024 the users of "Assistant Support" were 21,692 persons, which is about 50% more than in 2021 (Fig. 4) [44].

Health and social services have a key role in supporting the active life of the elderly in Bulgaria, and their importance is closely related to the maintenance of good health, social commitment and improved quality of life. Access to adequate health care and social services is a crucial factor in the physical and mental well-being of older people, which in turn allows them to remain active participants in society for a longer period.

Health is at the heart of active ageing, with chronic disease prevention, healthy lifestyles and access to medical care being vital for older adults. In Bulgaria, however, social inequalities and poverty continue to be

a significant challenge, and these factors often limit access to necessary health services. This leads to greater vulnerability of poorer populations who are at higher risk of chronic diseases, limiting their ability to lead

active and independent lives. Health services aimed at disease prevention, early diagnosis and promotion of physical activity play an important role in keeping older people physically active and socially included.

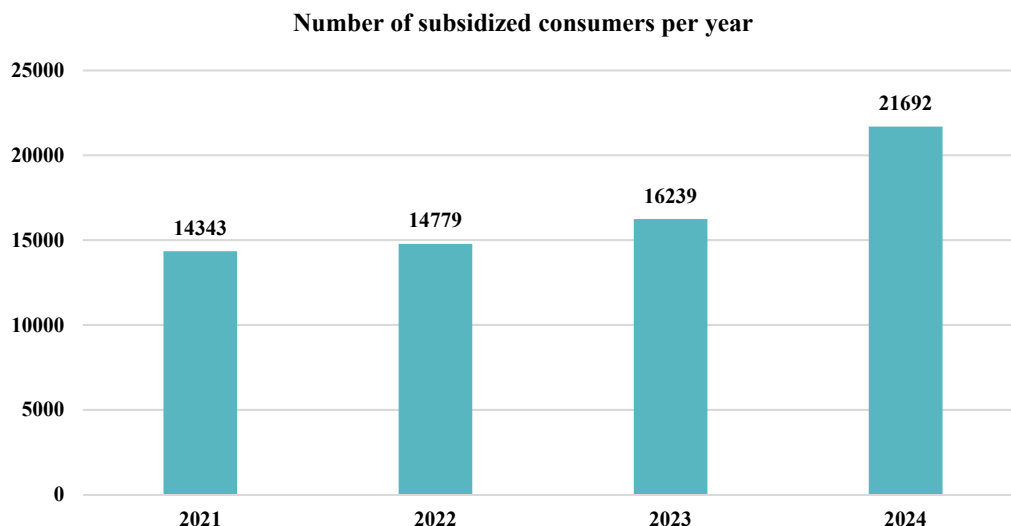


Fig. 4. Number of subsidized users "Assistant Support"

Social services, in turn, complement health care by providing support for older people to remain independent and engaged in the community. Personal Help and Assistant Support programs, which are delivered in a home or community setting, are key to reducing the risk of social isolation, while encouraging older people's activity and participation in society. These services help seniors maintain their independence and dignity by providing them with the help they need to cope with daily activities, which is important for maintaining their physical and mental activity.

Social and economic consequences of poverty for the elderly and senior people

The relative share of the poor among the elderly over 60 in Bulgaria has a significant impact on their active life. The high level of poverty among this age group limits their opportunities to participate in public life, access health services, education and other

important resources needed to support active and healthy aging.

The data show significant fluctuations in the relative share of the poor among the elderly over 60 in Bulgaria over the last decade (Table 3) [43]. Statistics shows that the relative share of the poor among the elderly over 60 in Bulgaria in 2013 was 25.6%, with significant fluctuations observed in the following years, reaching a peak of 33.3% in 2020 and falling to 20.9% in 2023. The percentage of poor men is relatively lower compared to women. In 2013 it was 20.0%, with a low of 16.2% in 2016 and a drop to 18.0% in 2023. The high poverty rates in the period 2019-2022 as a result of the COVID pandemic-19, accompanied by a number of economic, social and health factors further exacerbate the situation, leading to an increase in poverty and social isolation among the elderly.

Table 3

Relative share of poor among adults aged 60+

	(% of total)										
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	25.6	20.8	29.0	22.6	28.1	26.3	31.0	33.3	30.2	31.1	20.9
Men	20.0	17.6	22.3	16.2	20.3	19.7	25.3	26.4	24.0	21.5	18.0
Women	29.6	23.1	33.9	27.2	33.7	31.0	35.0	38.3	34.7	37.9	23.0

Poverty has a profound impact on active living, manifesting itself in multiple aspects of their daily lives and well-being. The data show that a significant part of the elderly in Bulgaria is affected by poverty, which significantly limits their access to basic services such as health care, education and social activities. Particularly alarming is the peak of poverty in 2020, reaching 33.3%, which can be linked to the consequences of the COVID-19 pandemic. The trend towards poverty reduction to 20.9% in 2023 indicates some success of the implemented policies, although the problem remains serious. Poverty limits opportunities for social contact and participation in public life, leading to social isolation, poor mental health and reduced support from society. Insufficient access to quality health and social services and educational opportunities also contributes to the deterioration of the quality of life of older people, as chronic diseases and lack of continuing education reduce their competitiveness in the labor market and their ability to adapt.

Analysis of the trends of the economically active population and the unemployed among people over 55 for the period 2012-2023.

Analysis of data on employed and unemployed persons aged 55 and over reveals significant trends and relationships that reflect the complex dynamics of the labor market and the influence of national and regional policies.

From 2013 to 2023, the number of persons aged 55-64 in the labor force increased from 560.9 thousand to 644.8 thousand (Table 4) [43], and the economic activity rate also increased from 54.1% in 2013 to 72.1% in 2023 (Fig. 5) [43]. This shows an increase in the participation of older people in the labor market and a steady growth in the number of older people who remain active in the labor market.

The number of employed persons over the age of 65 is also increasing, albeit at a slower pace, from 48.5 thousand in 2013 to 112.9 thousand in 2023, with the economic activity rate also increasing, from 3.5% in 2013 to 7.5% in 2023. This shows that the percentage of people working after retirement age is increasing, although it remains significantly lower compared to the 55-64 age group.

Table 4

The workforce aged 55 and over, (thousands)

Year	55-64	over 65 years old
2013	560.9	48.5
2014	578.7	57.2
2015	580.5	61.0
2016	579.0	64.4
2017	604.2	79.7
2018	614.6	86.3
2019	638.5	99.6
2020	632.1	99.9
2021	628.8	94.3
2022	641.2	102.4
2023	644.8	112.9

The number of unemployed persons aged 55 and over shows a downward trend from 72.4 thousand in 2013 to 25.6 thousand in 2023 (Table 5) [43], with some increase in 2020 and 2021, probably due to the

pandemic, as the 55+ unemployment rate also declined significantly from 11.9% in 2013 to 3.4% in 2023 (Fig. 6) [43].

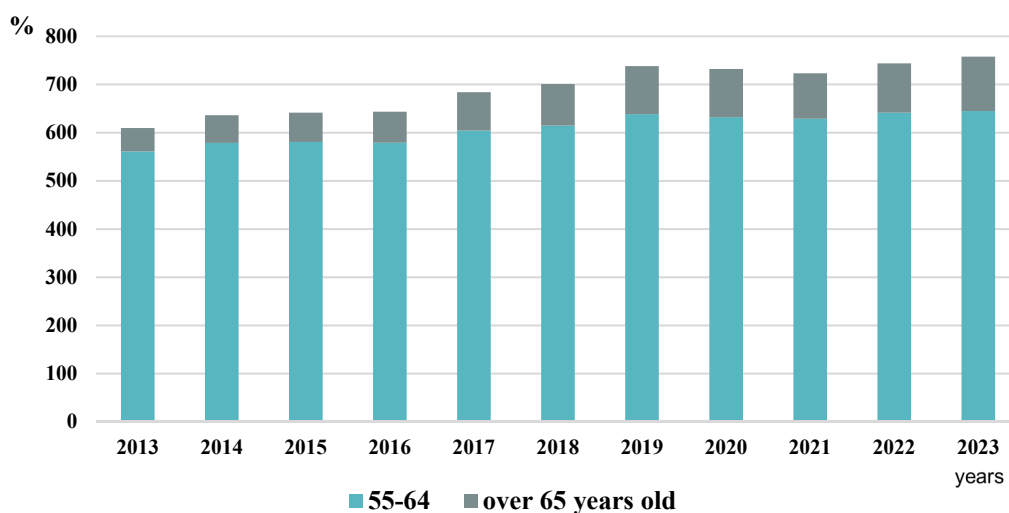


Fig. 5. Coefficient of economic activity of the population aged 55 and over

The positive relationship between the increasing rate of economic activity and the decrease in the unemployment rate indicates that more older people remain active in the labour market and at the same time the difficulty of finding a job decreases. This can be attributed to various factors, including a better economic environment and successful labour policies.

Bulgaria is introducing a series of policies and programs for the activation of the elderly in the field of employment, responding to the priorities of the National Strategy for Active Life of the Elderly (2019-2030) [34]. The analysis of the measures taken shows a multifaceted approach to the improvement of working and social conditions for this demographic group.

Table 5

Unemployed persons aged 55 and over, (thousands)

Year	55 and over years
2013	72.4
2014	70.7
2015	53.1
2016	44.4
2017	38.4
2018	31.1
2019	27.3
2020	29.6
2021	30.7
2022	25.1
2023	25.6

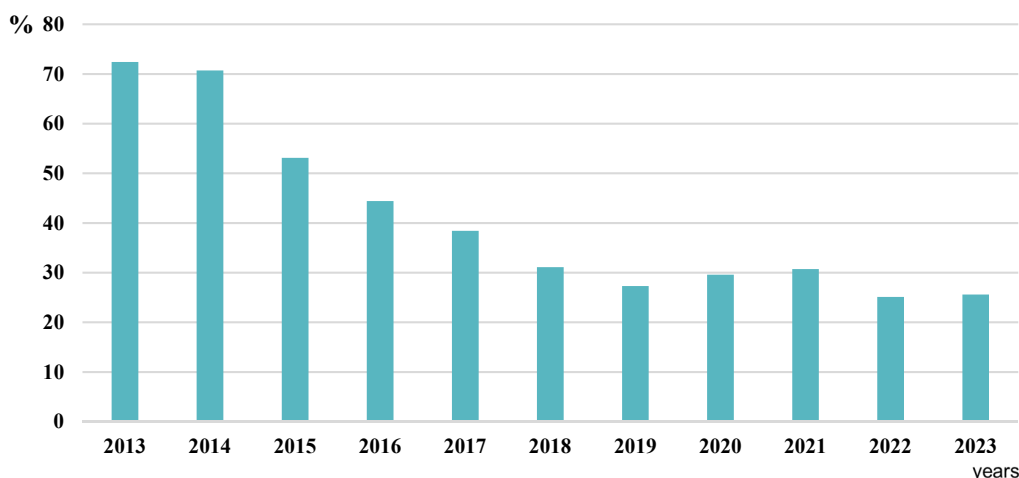


Fig. 6. Unemployment rate among the population aged 55 and over

After 2012, in connection with the above-mentioned priority regional measures and applying the measures to them, the Bulgarian government finances various initiatives through the Employment Agency.

The **"Retirement Assistance" program** in Bulgaria is a central component of the country's strategy for promoting active life and continued employment among the elderly. The program is aimed at helping unemployed persons who are close to retirement age, but do not yet meet the requirements for social security experience or age. The purpose of the program is to provide employment to these persons, providing them with financial stability and the opportunity to accumulate the necessary insurance experience.

After 2012, through the implementation of programs and initiatives at the national level, a series of actions aimed at building key skills and competences, professional training, social inclusion, increasing qualifications and economic independence of people over 50 years of age are being undertaken as a priority and consistently.

One of the most large-scale programs is the **National Program "From social benefits to ensuring employment"**. The program targets the long-term unemployed and people on welfare, providing them with employment opportunities, leading to a reduction in dependency on welfare and an increase in their income. It offers participants opportunities to engage in various types of employment, often community or socially useful activities. By engaging in these activities, participants not only gain new skills and experience, but also restore their work motivation and self-esteem. This form of employment allows participants to return to the labor market and become economically active, while reducing their dependence

on social benefits. The effect of the program is multidirectional. On the one hand, it leads to a direct increase in the income of the participants, giving them the opportunity to earn a salary instead of relying entirely on social benefits. On the other hand, the program also has a long-term impact on the social and economic integration of the participants, which contributes to their better inclusion in society and reduces the risk of social isolation. Also, the program has a positive effect on local communities, as participants often get involved in projects that improve public infrastructure and the quality of life in the places where they live. This creates added value for society as a whole and strengthens social solidarity.

Regional and branch programs provide opportunities for specific training and employment in different regions and industries, leading to the improvement of the regional economy and reduction of unemployment. The main objective of regional programs is to create new jobs and improve economic activity in regions with high unemployment or structural problems. This is achieved by promoting local businesses, supporting start-ups and developing key industries that can offer sustainable jobs to the local population [45]. The programs also aim to support economically underdeveloped regions by stimulating the creation of new job opportunities and reducing economic imbalances between different parts of the country. Branch programs, on the other hand, are focused on specific industries that have significant potential for growth and development but face a shortage of skilled labor. These programs provide training and retraining opportunities for workers, thus increasing their skills and ability to meet the needs of the industry. By improving the professional skills of

the participants, branch programs contribute to the greater competitiveness of sectors that have a strategic importance for the national economy. One of the main advantages of regional and branch programs is their flexibility and ability to meet the specific requirements of the local labor market.

Incentive measures under the Employment Promotion Act, in which they play an important role in encouraging employers to hire older workers by offering subsidies and financial incentives. This not only helps to increase employment among the elderly population, but also contributes to reducing the state's expenditure on welfare and benefits. The main purpose of these incentives is to overcome prejudice and discrimination related to the employment of older workers. Employers are often hesitant to hire older workers due to concerns about their productivity, adaptability to new technologies, or long-term employability. By providing subsidies and financial incentives, the state reduces the risk for employers and encourages them to offer jobs to this vulnerable group. These subsidies may include partially or fully covering the wages of the employed elderly for a certain period, as well as providing funds for training and retraining if necessary. In addition, the programs may also include other forms of financial support, such as compensation for costs related to workplace adaptation or provision of suitable working conditions. The results of the implementation of these incentive measures are multidirectional and positive. On the one hand, they lead to a real increase in employment among older people who might otherwise remain excluded from the labor market [46]. This has a direct effect on reducing poverty among this age group and improving their economic situation. Older people who manage to find work through these programs improve not only their financial stability, but also get the opportunity to stay active and socially included.

Many other programs and projects, such as "Chance for work" and "Compass" are in line with the leading initiative of the EU under the Europe 2020 strategy, and the National program "A new opportunity for employment", as well as projects financed by the Operational Program Human Resources Development, correspond of the need for investment in the knowledge and skills of the workforce.

The implemented programs demonstrate a positive impact on the social integration and economic independence of older people and show a positive impact on the functioning of the labor market and socio-economic development [11]. They provide opportunities for upskilling and overcoming social isolation, while improving local economies and highlighting the improvement of vulnerable regions.

Despite the progress made, there are some drawbacks that limit their effectiveness. The implementation of these programs faces challenges such as limited financial resources, low awareness of the problems of the elderly in local communities, and weak intersectoral cooperation [5]. Many active aging policies are dependent on short-term projects or external funding, which means that when these programs are completed, their results are not always sustainable in the long term.

CONCLUSION

1. Bulgaria is facing significant demographic challenges due to a rapidly ageing population, which is putting significant pressure on the labour market, social and healthcare systems. While progress has been made in increasing the economic activity of the over-55s and reducing unemployment, challenges remain, such as insufficient institutional coordination and the lack of an integrated policy framework. These challenges impede the effective management of ageing-related issues and increase the vulnerability of older people.

2. The growing share of people over 65 in Bulgaria poses significant threats to economic stability. Despite the increasing economic activity of older people, persistent social and economic inequalities, including poverty and limited access to healthcare, are worsening the quality of life of older people. Addressing these disparities is crucial to creating a more inclusive and equitable society.

3. Establishing a coordinating body to bring together institutional efforts and stakeholders is essential for more effective management of ageing policy. Such a body could ensure better alignment of resources and strategies, contributing to the successful implementation of comprehensive policies aimed at older people. Sustainable financing of these programmes, including innovations such as digital education for healthy lifestyles and chronic disease prevention, is also a key requirement.

4. Expanding access to health and social services is vital to reducing social and regional inequalities. Investments in upgrading health centres in disadvantaged regions, developing telemedicine solutions and deploying mobile health teams can significantly improve healthcare delivery and mitigate disparities.

5. The priority should be to promote the active participation of older people through programs that encourage physical activity, social participation, and engagement in economic and cultural activities. These initiatives will not only improve their integration into society, but also their overall well-being and quality of life.

6. Vocational training and retraining programmes for people over 55 are crucial to increase their competitiveness in the labour market. At the same time,

promoting healthy lifestyles by emphasising the prevention of chronic diseases, combating addictions, and promoting healthy eating habits will support both physical and mental health.

7. Implementation of these measures will reduce pressure on Bulgaria's healthcare system, improve the social and economic conditions of older people, and support the country's long-term economic growth by promoting a more productive and integrated ageing population.

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Stasiuk Y. – investigation, writing – review & editing, project administration.

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