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LONG-TERM CARE NEEDS ESTIMATION IN BULGARIA. METHODOLOGICAL PROBLEMS – LTC DEFINITION, CHOICE OF CRITERIA AND INDICATORS

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Abstract: *The study evidences the need to develop long-term care in Bulgaria based on of analysis of the demographic situation in the country and the necessary social transformations. The compensatory role of public policies supporting people who need long-term care and their families is crucial in the context of an extremely aged population, increased and increasing proportions of the oldest people and lonely older people, a specific structure of migration flows, a workforce reduction and necessity of higher employment.*

I propose a methodologically grounded choice of long-term care definition, criteria and indicators for LTC needs estimation. The assessment of the needs and the coverage of social and health services shows that Bulgaria belongs to the group of countries in Europe with the least developed public services in the long-term care mix. The assessments in the study could help to plan long-term care policies in Bulgaria.

Keywords: population ageing; long-term care definition; disability; self-reported long-standing limitations; criteria and indicators for LTC needs and coverage assessment.

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INTRODUCTION

As the population ages, a need to adapt the socio-economic systems of societies is emerging. More and more countries are recognising this and developing policies that address the problems of older people as a growing group of population. Population ageing is also recognised as a challenge by policies at a European level. A string of various documents was developed after 1997: agendas, reports, strategies, decisions and conclusions issued by different institutions (Черкезова, 2011). A specialised Ageing Working Group was set up at the Economic and Financial Affairs Council at the European Commission aimed at developing long-term forecasts on the impact of ageing on the budget systems of the Member States and Norway (a total of 6 reports by 2018).

The orientation towards the issue of population ageing is not overlooked by the strategic documents and the policies in Bulgaria. Quality of life and poverty, care for the elderly are recognised as a challenge in a number of planning documents (Updated National Strategy for Demographic Development of the Population in the Republic of Bulgaria 2012–2030, the National Strategy for Poverty Reduction and Promotion of Social Inclusion 2020, the National Concept for Promoting of Active Ageing in Bulgaria 2012–2030, the National Strategy for Active Ageing in Bulgaria 2019–2030, the National Strategy for Long-Term Care and the Action Plan coordinated with it for the period 2018–2021, etc.). The rhetoric in the strategic documents issued in Bulgaria tends to be oriented towards the activation of the elderly, with a focus highlighting the issues of their active inclusion, with more emphasis on considering them as human capital, i.e. as a resource for the economic development. This strategic course is adequate to the reduction of the labour force, the shortage of sufficient staff in many sectors of the economy and to the secondary effect of tackling age-related poverty. However, is that sufficient?

In a number of studies, the elderly population is perceived to be a fully entitled recipient of the goods created by humanity (including by the elderly themselves throughout their lives). These researches focus on the public commitments to some members of this group (including a dignified life in good health, the right to full expression of this generation, protection of human rights and counteracting discrimination against the elderly, living single people dependence, especially women and their social exclusion, Etc. (Larsson, 2007; Hoff, 2008; Baltes P, 2003; Barnes, Blom, Cox, Lessof & Walker, 2006; Scharf, Phillipson, Kingston & Smith, 2001). As the age increases, individual differences both in performance (Duell, et al., 2006) and in health increase. This is a good reason to support policies that are tailored to each individual case. This also means that active policies for older people must coexist with some passive policies that support the improvement of their life quality. The two types of policies are not in conflict. They aim to support people with objectively existing different needs and unequal opportunities.

One of the public policies that support people without necessarily activating them is that of long-term care. It is one of the areas of governance related to population ageing where for a long time there were scarce and insufficient policies, measures or actions to be implemented in practice in Bulgaria (Салчев, 2017). One of the

main barriers restraining a successful application of policies in this area is the lack of precise estimates on what the needed scope of those policies should be, i.e. on the needs of long-term care.

OBJECTIVE

The objective of this study is both academic and pragmatic and it is to add some support to the long-term care policies in the country (a pragmatic component) **using a methodologically reasoned analysis and estimate of the needs of long-term care and demographic system's potential opportunities to provide such care within the family in the context of population ageing in Bulgaria** (an academic component).

TASKS

In the context of the implementation of the objective, four tasks were completed:

- analysis of the demographic situation in Bulgaria from a perspective of the necessary social transformations relative to the consequences of ageing of population in the area of long-term care;
- methodologically justified choice of a definition, defining criteria and selection of indicators and an estimate of needs on the basis of the above;
- estimate of long-term care needs through analysis of microdata from a survey;
- estimate of the coverage of long-term care in the country based on the existing official statistics and the survey data.

Structurally, the study includes the completed tasks in the specified sequence.

METHODS

The basic methods consist in analysis of documents and research studies, descriptive statistical analysis and correlation analysis of official statistical data provided by NSI, Eurostat, the National Centre for Public Health and Analysis (NCPHA), reports of the Social Assistance Agency (SAA) and microdata from a survey prepared partially for the purposes of the presented estimate of long-term care needs in Bulgaria.

In the period March 15 – April 13, 2018, within the framework of the “Measures for overcoming the demographic crisis” project, a survey was conducted among the Bulgarian population aged 18 and over entitled “Labour force, migrations and population ageing” (N = 1500). The survey helped define and select adequate measures in the field of long-term care, health system, pension system and policies for people at the end of their careers. One of the modules was on “Health and long-term care”. The estimate of needs is based on the data from the module. For brevity and convenience in the text, when quoting and analysing data from the Labour Force, Migration and