

## Social Experimentation for Active Aging

### Outline Template for Local Mapping/Base line report in the Active Age-Social experimentation project

#### Context

The overall aim of this proposal addresses the social needs of older people by seeking to improve social policy in relation to the social and economic activation of older people who are not being reached by current policy measures.

The project has the following objectives:

- To undertake four pilot social experimentation action research evaluation based small scale interventions in four locations in 3 member states (Prague(Czech Republic); Edinburgh(semi-independent region of Scotland),Maribor(Slovenia) and Herefordshire(UK) to generate possible improvements to current policy .These social experimentation action research pilots will have the common key features:
  - Establishment of a Local Action Research Group (LARG) in each of the four locations. Key players in these LARG's have already agreed to take part. Letters of commitment from local authorities, ESF managing authorities, NGO's, employment services are attached as additional documents to this application. These LARG's are multi-sectoral and multi-level governance in make-up.
  - Each LARG also has identified a local evaluator. In all cases these are researchers/evaluators with established track record.
  - Each LARG will undertake the following key actions:
    - Undertake a base line study which captures the current policy context in the targeted areas and its impact on the targeted group
    - Implement a small scale social experimentation which is action research based .This will have a key features of having user involvement as a key element in the research/evaluation methodology
    - Produce a local evaluation report which covers the evaluation of the local social experimentation and makes recommendations in relation to implications for policy in relation to the target group
    - Participate in a transnational programme to develop a transferable methodology and framework for evaluating social experimentation actions.
    - Undertake local/regional /national dissemination
  - To undertake a transnational exchange and development programme. The goals of the programme are:
    - To develop a transferable methodology and framework for evaluating social experimentation actions.
    - To support mutual learning and capacity building

**Lead partner:**  
**Edinburgh  
Chamber of  
Commerce  
(UK)**

*PISCES WM (UK)*

*Research  
Institute for  
Labor and Social  
Affairs (CZ)*

*Economic  
Institute Maribor  
(SL)*

*The Association  
of Societies for  
Social  
Gerontology of  
the Republic of  
Slovenia (SL)*

*With the support  
of QeC-ERAN*



---

## Social Experimentation for Active Aging

- To realise these two goals the transnational exchange and development programme has the following key elements:
  - Three transnational workshops which will bring together members of the four LARG's, including the local evaluators and LARG co-ordinators. The first workshop would centre on developing a shared methodology and framework for evaluating the four social experimentation actions. This would be "tested" at local/regional level. The second transitional workshop would bring together the same delegates in order to share issues and lessons emerging for the social experiment actions and their evaluations. The final workshop would bring together the same delegates to share their draft evaluation reports and implications for policy emerging.
  - One transnational dissemination conference to ensure that the outcomes of the project are widely shared especially targeting EU institutions and EU networks connected to the policy issue(s).
  - The process would be supported by a transnational evaluator who would also work as a "co-ordinator " for the local evaluators and establish a series of web-based and telephonic discussions between them in relation to preparing materials for the transnational programme

### The Outline Template

#### OVERALL GOAL

The objective of this local mapping/base line study is to obtain an overview on the current situation in each city/region in relation to older people and active inclusion, through employment, micro-enterprise or participation in social life. **(NB: The focus will reflect the goals of the local pilot actions)**

#### OVERVIEW OF CONTENTS

1. Identification of key trends and issues at regional/city level on active inclusion for older people supported by figures and breakdown (when available) by gender, age, socio-economic status and ethnicity/nationality
2. Identification of current actions/services provided and needs met in relation to the goals of the local pilot action.
3. Priority needs that are not covered by the services provided: gaps in terms of particular types of services

## Social Experimentation for Active Aging

### LOCAL MAPPING/BASE LINE STUDY - SLOVENIA

Partner	Economic Institute Maribor, Human Resource Development Centre
Name of authors	Sonja Gavez Irena Lužar Dušanka Lužar Šajt
Date	6 <sup>th</sup> December .2010

**Summary:** the current situation and main issues, key trends related to active inclusion and older people in your "region" supported by figures and breakdowns by age, gender, socio-economic status, and ethnicity/nationality (6-8 pages maximum)

The Slovenian population is old (the share of population aged 65+ is relatively high, while the share of young population is modest) and the impact of population ageing to a slow growth of Slovenia's population has long been noticed. At the last census in 2002 the share of the young (0-14 years) hardly exceeded the share of persons aged 65+. The tendency of decrease in the share of young population and increase in the share of the third generation (i.e. older and the oldest population) in the total population is most obvious in the Podravska, Zasavska and Goriška statistical regions.

The Podravje region is the fifth biggest region in Slovenia, as it covers 2,170 km<sup>2</sup>. In July 2010 it had a population of 323,343, which represents 15.8 % of total population in Slovenia and puts the region on second place based on its population.

As mentioned, the rate of elderly in Podravje region is higher when compared to Slovenian national average. The share of people in the age of 50 or more in July 2010 was 38.0 % and has increased from 34.3 % in 2003. It is also higher than Slovenian national average which was 37.2 % in 2007 and 33.1 % in 2003.

The following table presents some basic trends for the population in Podravje region, based on the shares of its main age groups, average age of the population and the ageing index.

	Population	Main age groups (age)			Shares based on age %			Avg. age	Ageing index
		0 - 14	15 - 64	65+	0 - 14	15 - 64	65+		
<b>1999</b>	319,605	48,487	226,456	44,662	15.2	70.9	14.0	39.2	92.1
<b>2000</b>	319,717	47,224	226,880	45,613	14.8	71.0	14.3	39.5	96.6
<b>2001</b>	320,078	46,102	227,071	46,905	14.4	70.9	14.7	39.9	101.7
<b>2002</b>	319,804	44,953	226,868	47,983	14.1	70.9	15.0	40.3	106.7
<b>2003</b>	319,426	43,841	226,857	48,728	13.7	71.0	15.3	40.6	111.1
<b>2004</b>	319,114	43,040	226,477	49,597	13.5	71.0	15.5	40.9	115.2
<b>2005</b>	319,235	42,464	226,261	50,510	13.3	70.9	15.8	41.2	118.9
<b>2006</b>	319,706	41,993	226,240	51,473	13.1	70.8	16.1	41.5	122.6
<b>2007</b>	321,781	41,591	227,058	53,132	12.9	70.6	16.5	41.8	127.7

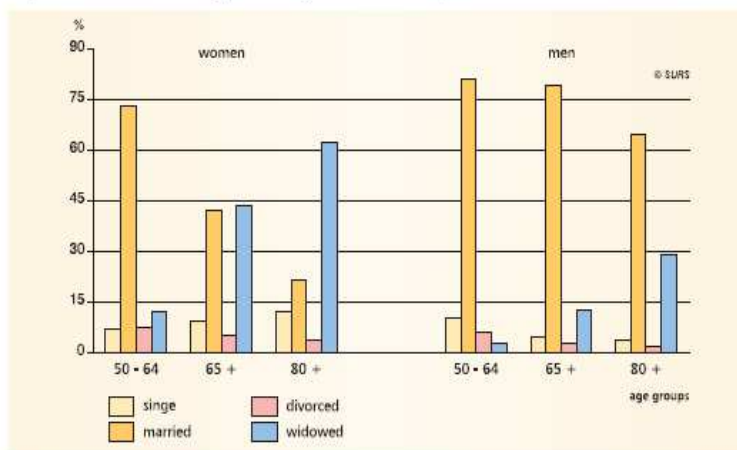
It is evident, that the number of people and their share among the total population in Podravje region, who are 65 or more years old, has been constantly increasing during last years. Consequently the average age and the ageing index have also been rising. All these indicators for Podravje region are above the Slovenian national average. In Podravje Region, there were 16, 5% of people in the age group 65+, the average age was 41.8 years and the ageing index was 127.7 in 2007.

Current projections show that by the year 2050 the share of people in the group 65+ in Slovenia will be 31.1 % and their number will double. Another worrying indicator is elderly dependency ratio, which represents the relationship between elderly and the active population. In 2004 the coefficient was 21.4, in to 2010 it

## Social Experimentation for Active Aging

increased to 24.9 and it is projected that it will more than doubled by 2050 (to 55.6). It is noteworthy to mention that the life expectancy in Slovenia is increasing. A boy born in Slovenia in 2005/06 can expect to reach almost 75 years and a girl 82 years; that is 0.8 of a year more for a man and 0.6 of a year more for a woman than in 2004/05. In the last three decades the life expectancy for a man in Slovenia increased by 8.3 years and for a woman by 7.7 years.

Population of Slovenia aged 50+ by marital status, Census 2002



Source: SORS, Census 2002

The fact is that in Slovenia women die older than men and this affects also the situation shown by the data on the marital status of men and women aged 65+. Up to the age of 65 most of both, men and women are still married. With regard to persons aged 65+ and especially persons aged 80+; the share of widowers and especially of widows is much larger than the share of married or single persons.

At Census 2002, in Slovenia majority of the elderly aged 65+ lived in »private« households with two or more members (86.6 % men of such age and 62.4% women of such age). The shares of both are decreasing with age. In this age

group 3.4% of people lived in collective households (2.1% men and 4.1% women) at the 2002 census. Their share is increasing after the completed age of 75. The largest share of persons who at the 2002 census lived in collective households was recorded in the age group 85+, namely 15% (8.8% men of such age and 17.0% women of such age).

Many persons older than 65 lived alone at the 2002 census: there were twice as many such women than men. In the group of persons aged 65+, 25.3 % of them lived alone (one-member households), namely 11.4 % men and 33.5% women. The share of women who live alone and are in the age group of 70+ is always higher than 33 %; this share, however, is the highest in the age group 80-84 (41.8 %). On the other hand, only 5.3 % men of such age live alone.

The intensity of population ageing is reflected in the increasing number of pensioners. The number of pension beneficiaries in Slovenia, entitled to receive pension in Slovenia, is increasing; their number (old-age, disability, family and farmers' pensions) has been increasing in the last decade (2000–2007) on average by 1.5 % per year. In 2007 there were 543,473 retired persons in Slovenia, which is 1.3 % or 6.9 more than a year before. 9.5 % older than 55 are still active (employed), others are retired. But there are some social problems pensioners are dealing with, for example: average pension in 2008 in Slovenia was 467€, which presented 61.5% of average salary. The lowest pension was 163 €, and 40 % of pensioners get less than 400 €.

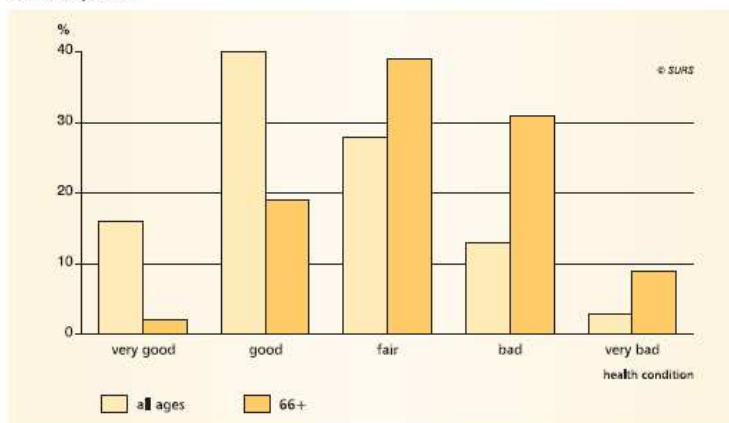
Among the pensioners in 2007 the highest share was represented by old-age pensioners (61.2 %), followed by disability pensioners (17.4 %), family pensioners (12.1%) and widow pensioners (4.8 %). In the 2000-2007 period mostly women were in the group of pension beneficiaries.

## Social Experimentation for Active Aging

Survey on Living Conditions, EU-SILC, Slovenia, 2006 included also questions on the general health condition of the selected person. most common answer to this question was "good" (41 %), 16 % of people answered very good, 28 % 13 % bad and 3 % very bad. The health condition of people is above related to their age: the older the person, the worse is her/his health condition.

The hospitalization level due to disease (which is in Slovenia relatively high in the first year when child is born) is steeply increasing completion of 65 years of age, much with men than with women.

General health condition of a person according to the age group he/she belongs to, Slovenia, 2006



Source: SORS, Survey on Living Conditions; [http://www.stat.si/pxweb/Database/Dem\\_soc\\_08\\_zivljenjska\\_raven/08236\\_zivlj\\_pogoj](http://www.stat.si/pxweb/Database/Dem_soc_08_zivljenjska_raven/08236_zivlj_pogoj)

The  
fair,  
all

the  
after  
more

The study on self-care of home-dwelling elderly people living in Slovenia showed that the formally guided (52.3 %) is the most common behavioural style of home-dwelling elderly people. Those people have high functional capacity, high life satisfaction and high self-esteem. Responsible behavioural style follows (25.8 %) and the last is independent (14.2 %). Those elderly people who do not take care of themselves are abandoned (7.6 %); they are not satisfied with their way of life and have low self-esteem.

About employment: Europe is today meeting the continual lower birth rate, which does no longer enable the renewal of the population; the ever increasing life expectancy; and the aging of the »baby boom« generation, the reason why the number of elder workers, retired persons and very old people is on the rise.

The demographic picture in Slovenia is similar to that of Europe – in the next 10 – 20 years we expect a great increase of the number of old people. Already today this percentage amounts to an average of 14 to 15 %. So we are facing the age of geronto-boom.

Aging process will always have a significant influence on increasing number of elderly and retired, as well as on reducing the number of economically active population. From year to year less people will contribute to social and health security through social, pension and healthcare systems of the country and the greater will be share of dependant population, which will need social and health security.

The proportion of "active elderly" in the workforce is increasing, but employment in the age group 55 to 64 is still too low. The employment rate of older people in Slovenia is clearly rising, but is still below the EU average. In the 55-64 age group, recorded in 2009 (source: EUROSTAT) only 35.3 per cent are employed (32,8 in 2008 and 33,5 in 2007) , due to early retirement in the nineties

**Tabel: employment rate in the age 55-64 in EU and Slovenia (2001-2009)**

Total	2001	2002	2003	2004	2005	2006	2007	2008	2009
EU27	37,5	38,2	39,9	40,5	42,4	43,5	44,7	45,6	46,0
EU15	38,4	39,8	41,5	42,5	44,2	45,3	46,6	47,4	48,0
SLO	23,4	25,9	22,7	30,1	30,7	32,6	33,5	32,8	35,3



## Social Experimentation for Active Aging

Mail	2001	2002	2003	2004	2005	2006	2007	2008	2009
EU27	47,3	48,2	49,7	50,1	51,6	52,7	53,9	55,0	54,8
EU15	48,3	49,8	51,3	52,0	53,3	54,1	55,3	56,2	56,2
SLO	33,0	37,4	31,8	41,2	43,1	44,5	45,3	44,7	46,4

Female	2001	2002	2003	2004	2005	2006	2007	2008	2009
EU27	28,2	28,9	30,6	31,4	33,6	34,9	36,0	36,9	37,8
EU15	28,8	30,2	32,0	32,9	35,5	36,9	38,1	39,0	38,0
SLO	14,4	15,1	14,6	19,6	18,5	21,0	22,2	21,1	24,8

Source: EUROSTAT

The average retirement age was 61.2 years in the EU -27 in 2006 (EUROSTAT) as Slovenia is lacking behind with the average retirement age of 59,8 years in 2006. At the same time we must have in mind that there was objective of the Lisbon Strategy to raise retirement age on 65 years to 2010.

Raising the employment rate of older people in Slovenia is also one of the priorities of the labour market and data on employment shows slow but steady increase of employment rates of older people. In the last years. Employment rate for older women increased very slowly, in 2009 it was 24,8% (2008 – 21,1%; 2007 -22,2 %), while the employment of older men was 46,4% in 2009 (2008 – 44,7%; 2007- 45,3%).

A comparison of registered unemployed persons at the end of April 2009 with the previous year shows an increase in unemployment of 32.7 % in Slovenia, 27.4 % in the area of the Regional Office Maribor and a 21.3 % increase in the area of the Municipality of Maribor. The majority of unemployed in Slovenia and in the Municipality of Maribor are male (50.7 %; 50.6 %), while in the area of the Maribor Regional Office women are dominant with 50.5 %. In the age structure the highest share belongs to unemployed persons between 50 and 60 years (28.2 % in Slovenia and 26.5 % in the area of RO Maribor).

### Outline of proposed local pilot action (3-4 pages maximum)

What are the current actions undertaken/services provided to meet the needs of older people in relation to the "theme" of the pilot action? This should provide a short overview of the broader (national/EU) policy context as well as "compendium" of actions and key organisational players at "regional level". It would be good to incorporate actions funded through EU structural funds(ERDF/ESF)(10-12 pages)

The need for a successful re-integration of older people and for an active old age, which was already offered by the Madrid Declaration, is also present in Slovenian society. The society of all generations, based on the complementary roles of the elderly, calls for their non-discrimination and social inclusion.

Work is for the elderly an important social stimulus, since it's beneficial for people to remain active. In this way they "transfer" their knowledge and skills to others and further develop themselves. Active elderly are in better health and live longer, because they are still active in community, they feel as important part of it.

The reasons for the low employment rate in Slovenia lie in employment policies and the organization of the pension system who tended to promote inactivity of older workforce before 1990. Today public actors in Slovenia are more aware of the fact that the integration of older people into the labour market will constitute an important factor for ensuring economic growth in the future. As a result, strategies and policies for encouraging older workers to remain in employment (i.e. active employment strategy) have been established and the laws (Pension and Disability Act, Employment and Insurance against Unemployment Act) have been changed.

## Social Experimentation for Active Aging

**The main public actor in the field of employment initiatives for ageing workforce is the Ministry's of Labour, Family and Social Affairs** responsible for the arrangement and implementation of laws and other legislation in the area of employment, labour relations, on-job health and safety, pension and disability insurance, insurance against unemployment, employment and status of disabled persons and social inclusion.

Further, Slovenia is aware of the unfavourable demographic composition and the low proportion of elderly employed and has in 2006 started to develop a national **Strategy for active aging** i.e. active aging action plan for employment. The most important objective of the strategy for active aging are already covered by the objective of the EU, namely towards the Lisbon goal of an average of 50% employment rate, measures to achieve the goal are within the strategy defined as follows:

- identifying existing barriers to employment of elderly people;
- identifying benefits of employment of elderly people;
- definition of appropriate measures for the employment of elderly people;
- (enforcement of appropriate modern pension legislation);
- measures focused on investing in training, lifelong learning and skills aimed at providing the elderly with higher productivity and the employability and competitiveness in the labour market;
- measures aimed at improving working conditions and occupational health and adjustment at work;
- measures to change attitudes of employers and the general public to the elderly (promotion of employment of senior citizens).

**The Government of Republic of Slovenia adopted Measures to promote active ageing on 23<sup>rd</sup> September 2010.** The document is an information about measures regarding active ageing and represents an upgrade of Strategy for Active ageing until 2010 (solidarity, cohabitation and quality ageing of population), which was adopted by Government of Republic of Slovenia in 2006.

Within the specific measures, the target population are people aged over 45, because in order to efficiently and successfully invest into workforce and higher productivity, a timely inclusion into knowledge upgrade is of high importance for long term competitiveness into the labour market. Because the measures are related to drawing of the European funds (Operative Programme of Human Resources Development), they are planned within the period 2009-2013.

**The main goal and purpose of the measures is to increase average share of employment of elderly, aged between 55 and 64 to 43.5%** as stated in the Operative Programme of Human Resources Development 2007-2013 and at the same time follow the goal of raising the employment rate of population aged between 20 and 64 to 75%.

The document consists of three parts, which include following measures:

- Measures for unemployed, older than 45 – among key programmes for a faster inclusion of elderly unemployed are public works, subsidizing of employment, assistance programs for job-seeking, institutionalised training and introduction into work at employers, subsidizing of self-employment and expected employment of elderly within other programmes of active employment policy; an additional measure foresees a better, quicker and more effective proceeding of elderly unemployed at Employment Service of Slovenia.
- Measures for elderly employed include measures for training and education and measure for improvement of work conditions, health at work as well as training and competitiveness of elderly on the labour market. Among other important measures of promoting and awareness raising is also the promotion of culture of prevention and health at work.
- Measures directed at changing the attitude of employers and broader public are horizontal measures for promotion of active ageing and include a communication strategy and action plan of Employment Service of Slovenia for a promotional campaign for employment of elderly that will be directed at awareness raising of employers for employment of elderly, increased competences of employed at Employment Service of

## Social Experimentation for Active Aging

Slovenia for counselling the elderly job seekers, informational campaigns for small and medium sizes companies, influence on awareness of the broader public towards elderly in society and at measures for improvement of self image of elderly.

Among additional measures there are measures of the personal additional work, mini jobs and key emphasis of modernisation of pension legislation as an important element of active ageing.

Measures and programmes will be based on above mentioned implemented in the future years in Slovenia (2011 and further on) More or less the measures described in the above mentioned document are at the beginning of development phase.

Currently most of the direct activities that are implementing in Slovenia to promote **employment of older people** are carried out within the measures that raise employability of unemployed people, stimulate employers to create new jobs and employment of disadvantaged groups, and training and education for employment. Support as regards the re-entering of the labour market involves mostly (majority) the various financial incentives for employers (subsidy for employment and reimbursement for contributions that are rather non-simulative). However, there is also some counselling done and measures like public work programme and part-time employment.

Within the Employment Service of Slovenia a number of **active employment policy measures** were carried out to provide those unemployed persons who are less competitive on the labour market with the necessary additional knowledge, skills and qualifications, and therefore improve their chances of finding work. In 2009, 1.256 elderly unemployed over the age of 50 were included in various active employment policy measures in Podravje region (covered by Regional employment offices in Maribor and Ptuj) which represents 26% of all elderly unemployed over the age of 50 and **15,1% of all unemployed which were included in active policy measures** in the Region. Considered that the **share of elderly unemployed over the age 50 in Podravje in 2009 was 27,4% of all registered unemployed**, it is evident that the **share of elderly unemployed included in active employment policy measures is significantly lower than their share among all unemployed**.

**The active employment policy programme for 2009 envisaged four measures. Measure 1 (Advice and assistance in job seeking)** is carried out with the aim of providing advice and assistance to individuals who are looking for work and of informing them of vocational opportunities. It involves in depth work with specific groups of people to improve their employment opportunities and remove barriers by job seeking that they may encounter. Another purpose of the measure is to present and implement activities within the active employment policy programme. Within this measure the **Job Club programme** is carried out. It is a three-month programme where participants are equipped with information and skills regarding job seeking activities and are provided with constant assistance and counselling in order to improve the effectiveness of their efforts to find employment. The Job Club, which will be compared with the new pilot programme, in its existing form isn't adapted to the needs of elderly unemployed. Given that modern job seeking increasingly demands certain ICT knowledge it is one of the areas where elderly unemployed require additional support in order to be more effective as job-seekers. It is also relevant to mention that in 2008 in Podravje region the share of elderly which managed to get employment in the period between enrolment in Job Clubs and 12 months after its completion among all participants which managed to get employment was only 5,4% which is insufficient if compared with the share of elderly participants among all Job Club participants, which was 9,5%.

Activities are financed by national and European sources (mainly by European Social Fund).

**Participating in leisure, social, cultural and spiritual activities in the community**, as well as with the family, allows older people to continue to exercise their competence, to enjoy respect and esteem, and to maintain or establish supportive and caring relationship.



## Social Experimentation for Active Aging

**Slovene elderly are active in different spheres of activity: from helping their children families, volunteering in the communities, public engagement, housekeeping, personal hobbies, amateurish work, pensioner's organisations, political party, and self help groups to Third Age University.**

### Programmes and institutions designed for elderly

The most widely spread form of bonding and active participation of seniors is pensioners' organisations. **Slovenian Federation of Pensioner's Organisations** is humanitarian, voluntary, and non-party organisation of interests, operating over 60 years. Today more than 250.000 pensioners are actively participating in 486 organisations united in the Slovenian Federation of Pensioners Organisations. Their purpose is to improve the quality of elderly lives, actively participate in development of society, encourage bonding and conquer social exclusion. Main activities of societies are: sport and recreation, social and health activities, travelling, cultural activities such as singing, attending cultural events, manual skills, and educational activities in forms of courses and lectures. Majority of the activities are open only to members of the pensioner's organisations, with exception of events open for public.

Key motive for membership in pensioners' organisations is social inclusion. In the recent years there has been an increasing focus on strengthening social networks of seniors by education. Educational programmes for seniors have increased in numbers and diversity. Also the attendance is increasing.

The federation is since 2004 carrying out the project "Elderly for higher quality of life at home" or shorter "**Elderly for Elderly**". The project is aimed at uncovering the needs for help of elderly and organizing help for them; for all that live at home and are older then 69. Several pensioners' organisations are since the beginning gradually joining the project, so in 2007 there were 117 organisations involved with 1.384 volunteers visiting 51.000 elder fellow citizens (50 % of all elderly living in the area covered by involved organisations). The activation of volunteers is carried out within the framework of the pensioners' organisations. During their visits they are uncovering situations of abuse, violence and loneliness. According to so far existing field researches 25% of people, older than 69 years, need some sort of domestic help.

Each year there is a **Festival for the third period of life**, organized by Slovenian Federation of Pensioners. At the Festival seniors get the opportunity to bond, attend lectures or round tables, presentations, cultural and educational events.

The third generation is indispensable holder of intangible cultural heritage and carrier of fundamental cultural values for own and other generations and as such has very important societal role. In Slovenia this generation also ranks among most frequent users of public libraries and public media. Slovenia is therefore relieving different degrees of participation in **culture**, especially with the help of Public Fund for Cultural Activities network, public libraries network, museum network, and first of all with wide access to classical and electronic media. National cultural programme and existing cultural policy is therefore oriented towards stimulation for elimination of physical and socio-economical circumstances that are restricting chances for active engagement of third generation in cultural and social life. We are talking about easing access to culture for physical or similarly restricted older people, and at the same time enabling access to those with lower financial incomes or hesitation on suitability of their participation in certain cultural practices.

In the area of **intergenerational cooperation** Slovenia already has some history and practise, so intergenerational assistance is not something new. Various organisations have been working in this field for some time. A good practice is also a project for encouraging the voluntary work of the young for the elderly; **Fruits of Society** (started in 2006 and coordinated by Slovenian Philanthropy). The purpose of the project is to systematically join the elderly, who live at home, on one side and the school-age youth on the other side, with a purpose of assuring the additional help to the first, for instance socializing, reading newspapers, bringing necessary things from a store or a pharmacy, taking a dog for a walk etc. and enabling acquisition of the new knowledge, learning and socializing with elderly through the voluntary work to the latter. However, this kind of intergenerational assistance is far from extended.

## Social Experimentation for Active Aging

Among many NGOs, which in last period work in the field of care, help and social involvement of old population, there is **Association of Societies for Social Gerontology** of Republic of Slovenia with its head office in Maribor and its local contact centres for individual programme implementation. This Association has its subgroups and there are 486, they also have 5144 members – elderly people, 65 years old and above. This means that a very big density of subgroups works in Maribor, that is in the centre of Podravje region. The programme that the Association carries out:

- Elderly people self-help groups: a group consists of up to ten people and meets once a week. The work is organised and supervised by a trained couple of supervisors, mostly from the middle generation. The basic activity in a group is discussion. Parallel activities are singing, reading, exercising, excursions, meeting guests, praying, dancing, creative workshops, trekking, etc.,
- Intergenerational camps: an intergenerational camp is where the representatives of all three generations live together for a few days;
- Training and education of the volunteers for group supervisors;
- Intervention and supervision;
- Training and education of the local network organisers;
- Publishing the magazine "Prepletanja" ("Interplay").

**Anton Trstenjak Institute of gerontology and intergenerational relations** is the Slovenian national scientific and expert institution within gerontology and good intergenerational relations field in Slovenia. The institute was founded by few experts as private individuals, Slovenian Academy of Sciences and Art in 1992 and in 2004 by the Government of the Republic of Slovenia. Our work is interdisciplinary and includes sociology, psychology, medical sciences. According to the actual needs in this area the Anton Trstenjak Institute of gerontology and intergenerational relations developed and offers four types of programmes:

- Programmes for informing the communities on the possibilities for quality ageing, preparation on the old age and better intergenerational communication (lectures, round tables, informative brochures for every household, newspaper articles, TV and radio shows)
- Several short courses (3 times 3 hours in a small group of 12 people): for young people for better relations and communication with elderly; for elderly for better understand younger two generations, for quality life after the retirement, for caring for an elderly family member,... all those courses lead to practical lasting activities.
- Training and organizing intergenerational volunteers of all generations; for individual companionship or groups once a week, young people teaching old people some basic computer skills, old people helping youngsters with some school assignments and teaching them some traditional skills, ...
- The local self-organisation of these programmes: formation of the intergenerational association, care services, the elderly home, organisation of the relative's clubs – special self support groups of old people's relatives, organisation of the work of the intergenerational volunteers. The local intergenerational centre is the highest organisational form when implementing large number of different programmes in the local community of about 10.000 people.

Upon the research data and practical experience gained in developing and introducing a social network of programs for quality aging and a solidary coexistence of generations, the institute developed the **local intergenerational centre model**. The model is based upon comprehensive anthropology: a holistic view of man in his physical, psychological, social, spiritual, existential and developmental dimensions; a complementary unity of physical, psychic and social health; a complementary bonding of all three generations; and a life balance between the individual and the community. The greatest attention in the centre's work is paid to the links intermediate between individuals and the community that is to the family and, most particularly, groups formed by people's own choice on the principle of self-help and solidarity. Today they started to work on two such centres in the Podravje region.

### Learning in the third age

**Lifelong learning** is of key importance for individuals of all ages and holds an array of benefits for them and society. It promotes their full economic and societal participation, enables them to be better informed and more active citizens, contributes to their personal well being and fulfilment, supports their creativity and

## Social Experimentation for Active Aging

innovation, and increases their efficiency as workers or volunteers.

In Slovenia the participation of 25 - 64 age group in lifelong learning is higher than the EU average. Indicators for 2008 show 13.9 % participation for Slovenia and 9.6 % for EU-27. However, the participation in LLL is decreasing with age. **The results from the recent study on social integration of elderly show the strong correlation of active age and inclusion of elderly in social environment with the great impact of education and learning.** Conclusion on a research basis can be that learning habits and needs of future generations of elderly will differ from habits and needs stated today. But it can not be determined what kind of learning activities will be required.

In Slovenia today seniors most often take part in the **Third Age University**. This is not a formal university as such but it is an informal voluntary educational movement, meant for 50+, mostly retired people, but also for elderly workers out of work. It has been established to provide access to culture and education for the elderly and to contribute to changing the social and economic position of the elderly. The Third Age University encompasses at present 35 universities all over the country. Each Slovenian university organises study circles, lectures, and some of them also summer universities, educational camps, study trips, etc. The Third Age University has different goals to accomplish, be educational or social. Mentors are active and retired university teachers, researchers, renowned artists, newspapermen, young graduates or post graduates. Fields of activities: history, art history, ethnology, anthropology, geography, literature, journalism, music, psychology, astronomy, communication, language courses, computer skills, painting, health program, horticulture...

Another possibility for lifelong learning is offered by **LLL Centres**, that link together different training providers and their services with the aim to increase participation of population in lifelong learning, attract new target groups (also elderly) and make quality training and counselling accessible to all. In 2005 there were 13 LLL Centres established in Slovenia, 1 of them in the Podravje region that expanded their offer of counselling and ICT supported learning, and make them richer.

Special type of education programmes that are popular among seniors are **Study Circles**, organized by Adult Education Centres, public libraries and other institutions, where they in small groups explore different topics and mostly share their knowledge and experiences.

### Activity in the neighbourhood and main characteristics of social connections

Research shows that in Slovenia the individual's **social network** declines with age; thus the family network becomes increasingly important, and for some the integration into their social environment also gains on importance (an important role of the neighbours). Elderly are more interested to include into social network. Much of elderly decides to take part in some of the voluntary organization – most of the elderly are included in **local pensioner's societies and local Red Cross organizations** – these two organizations are mayor actors of fostering voluntary work of elderly.

There are **no direct links between municipalities and elderly**. Municipalities finance the programmes and activities of institutions that are founded for the support of elderly population. Those organisations apply on social care organisation, organisations for home support for elderly, elderly home, **Red Cross organisation** that widely integrates the elderly population as volunteers, etc. Municipalities in Podravje region also financially support various projects for elderly.

In Podravje region the **Municipality of Maribor** is currently running Gerontology centre that presents **information point** that is intended for attaining quality of live for elderly people – it offers quality and very simple accessibility to various information about services and activities related to the needs for old population. It also offers free access to internet.

In Podravje region eim, HRDC and Municipaty of Maribor / Slov. Bistrica, as partners in international project, are currently implementing **Q-Ageing project**, co-financed with the ERDF funds. Project is focussed on

## Social Experimentation for Active Aging

creating better conditions to enable active ageing (employment/LLL/ health/voluntarism).

What are the "limitations" of current actions/policy which have been identified by available evaluations /feedback data? (2-3 pages)

### Elderly on the Labour Market

Concrete measures included in the Slovenian Strategy for active ageing (**annual action plans**) are **still in the process of development**. Nevertheless, in recent years we have a lot of financed active labour market programmes/measures for unemployed in the area of carrier planning and job searching, but **none of them specialised for people over 50**, although they have special needs in the tackled area.

Gained abilities of elderly could be a solid basis for future development; by accepting their experiences and wisdom they are actively involved in improving life of society as a whole. Therefore a chance to carry out a job as long as they wish or are able to should be given to them, as well as the access to educational and training programmes since the encouragement of elderly to cooperate, represents the key element of active ageing.

To improve the situation of elderly on the labour market in the region it is necessary to raise awareness and inform employers as well as wider public about the meaning and added value of older population more intensively. By doing that lifelong learning plays an important role that is many times overlooked. Inclusion of population into lifelong learning represents the condition for competitiveness and productivity of each individual on the labour market within the full life cycle. Based on many years of experience in working with elderly unemployed people, we have found out, that they have:

- very low self-esteem,
- negative self-image,
- fear of any kind of change,
- consider themselves inefficient, regardless their widespread working experience,
- belief that no work is available,
- illness or disability,
- weak social network,
- lack of information about possibilities of education / training and employment,
- no awareness of the importance of lifelong learning,
- low motivation for any activity (only waiting for retirement),
- family responsibilities,
- etc.

If we would like to activate unemployed over 50 and motivate them for active employment, LLL and active ageing **we need to focus themes in the programme to their characteristics/needs** and as well to the needs of Slovenian labour market and demographic situation.

Slovenia also **hasn't adopted mechanisms for promotion and implementation of not stressful and graduated retirement**.

The employment rate of elderly in Slovenia is in comparison with other EU countries rather low due to the recent employment policies and the organisation of the pension system. Existing measures that raise employability of older unemployed people mostly include various financial incentives for employers, but also part-time employment and public work scheme. However there are **no measures designed specifically for elderly that would base upon their characteristics**.

During the discussions with citizens groups it was clear that there is no real history of **employing retired** persons although few of them did practice part time work - because of their affection for and connection to

## Social Experimentation for Active Aging

the profession, and as a soft transition from work to retirement. **Such employment is sometimes difficult also due to the legislative obstacles.**

### Inclusion into Society and Social Life

The elderly are included in various cultural, sports and spare time programmes that are provided in this sphere by non-governmental organisations for the elderly, including the numerically strongest Society of Pensioners of Slovenia, and the University for the Third Age University, and they are also active in numerous other organisations, **but there is still to low percentage of elderly in their activities promoting active social life.**

The participation of seniors in different **learning activities depends mostly on living arrangements and social network, but also on the participant fee required.** Activities that are free of charge are especially attractive.

Although Slovenia has some history and practice in intergenerational cooperation there is a **need to improve the intergenerational communication and relations.**

There are **no direct links** (for consultation, evaluation, planning...) **between the local communities/municipalities and the elderly**, but yet the municipalities do finance and support programmes and activities for elderly.

Slovenia still **lacks a proper system of preparation for the age that could develop and reconcile changes in life, develop new life style in this age** as affiliation to the generational life style. It doesn't defines extra roles for older people, doesn't have instructions for productive ageing and cooperation in social life. And this vacuum has a negative influence on cross-generational relations.

How are older "users" involved in relation to the development /evaluation of current services and policies (2-3 pages)

### Involvement in development an evaluation of current policies

In 1990 pensioners association from Maribor started their own political party named as **Democratic Party of Pensioners of Slovenia – DeSUS**. Today party stands for economically successful, socially fair and legal state. It is for society of free people where other values then profit and growth are at the forefront; and for society where business morale and good people-to-people relations are important. Today they have 7 members of parliament.

The most widely spread form of bonding and active participation of seniors is pensioners' organisations. **Slovenian Federation of Pensioner's Organisations** is humanitarian, voluntary, and non-party organisation of interests, operating over 60 years. Today more than 250.000 pensioners are actively participating in 486 organisations united in the Slovenian Federation of Pensioners Organisations. **The Federation is also engaged in adopting legislative decision.**

As already mentioned, there are no direct links between the local communities/ municipalities and the elderly, so elderly can influence the local policy through mentioned organizations.

### Involvement in development an evaluation of current services

Involvement in development and evaluation of current services of elderly population is **conditioned by the membership of organisations** that implements individual services.

What are the priority needs not met by these services/actions? (1-2 pages)



## Social Experimentation for Active Aging

The priority needs **not meet by existing actions** are:

- Need to rise awareness and inform employers as well as wider public about the meaning and added value of older people/employees (information campaigns, discussion tables, etc.) ;
- Need to design active labour market policy measures aimed at older unemployed people taking into account key features of weaknesses characterizing this group ;
- Need to design models and approaches of new voluntary work/activity schemes for older people with focus on strengthening of inter-generational solidarity ;
- Need for designing/implementing support activities/programmes of preparation for the age;
- Need to design new programmes to promote senior knowledge society – enhance participation in knowledge, culture, e-society ;
- Need to raise awareness of older people on the meaning of lifelong learning and inform them about the possibilities offered ;
- Need to ensure existing programmes to come near the local environments /neighbourhoods which are better accessible for older citizens ;
- Need to ensure regular events open for older citizens to express their needs and suggestions regarding quality ageing;
- Need to prepare regional/local action plans/strategies for active ageing.

### Other comments

### Sources

Please list the materials you used to write this report with links where appropriate

- Self-Care of the Home dwelling Elderly People Living in Slovenia. Danica Železnik. Academic Dissertation. Oulu University Press. Oulu 2007
- "Strategy for Care for the Elderly till 2010 - Solidarity, Good Intergenerational Relations and Quality Ageing of the Population". Ministry of Labour, Family and Social Affairs. Ljubljana
- Slovenia's Population is Ageing - New Solidarity Relations Between Generations are Needed. Statistical Office of the Republic of Slovenia. Ljubljana. November 2008
- 8th Festival for Third Life Period, Collection of Scientific Papers. Ljubljana 2008
- LARG Action Group. Maribor 2010.
- Statistical data on Active Employment Policy - Employment Service of Slovenia, Regional Office Maribor, Maribor 2010
- Measures to promote active ageing, Ministry of Labour, family and Social Affairs of Republic of

---

## Social Experimentation for Active Aging

Slovenia, adopted by the Government of Republic of Slovenia adopted on 23<sup>rd</sup> September 2010.

- <http://www.inst-antonatrstenjaka.si/>
- <http://www.ess.gov.si/>
- <http://www.mddsz.gov.si/>
- <http://www.stat.si/>
- <http://www.maribor.si/podrocje.aspx?id=0>
- Citizens groups. Maribor. Slovenska Bistrica. July – August 2009.