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The Bulgarian Village Today and the Paradoxes of the "Third Age"

Abstract

There is a marked process of the age balance in Bulgarian villages: only 17% of rural inhabitants are below able working age. The share of people above working age is constantly growing, and they now amount to more than 1/3 of rural inhabitants. This growth is, to a great degree, due to the "reverse migrants", people who have spent the greater part of their lives in the city and, after retirement, have returned to the village, usually their native place, in order to begin a new stage of their lives. They have made this decision both for economic reasons and for "ideal" motives. The reverse migrants are helping increase local social activity, for they are often of the highest educational categories and attract the next generations to the village, stimulating the interest in local culture. However, they are often disappointed, not finding support and encountering difficulties in the context of the undeveloped rural infrastructure.

Keywords: the village as a haven for the third age; third age; stages of the third age; local activeness; compensatory functions of the third age; "life-long learning".

The notion of "third age" is an expression used to classify those who would otherwise simply be called "old people". It is a fairly precise term for it reflects the key stages of the human life cycle.

The **first age** are the young who have not yet come of age and have not begun their regular occupation (this group usually includes people under the age of 18); the **second age** are those people of active working age, between 18 and the legally limited term of retirement. The **third age** is the term used to classify

people of retirement age, often defined as people **above active working age**. However tentative the legal definitions of these three basic age groups, which are different in different countries, the division points to many specific features shared by people in each age group, and these differences are easy to read from the data of sociological surveys presenting distribution by age.

Here we should recall a synonym used in studying people in "third age". They are often referred to as persons **above active working age**, but also as **pensioners**, and this hardly shifts the denotation of the subject of the survey, but only represents a specific emphasis of research. But the Bulgarian expression "elderly people" [*vazrastni*] in the sociological context has a double meaning. In some cases, this concept is used synonymously with adult, a person legally "of age", responsible before the law and customs, i.e. as meaning *non-children*. Compare: children and adults; children and parents; problems for adults, not for children, etc. In other cases, *vazrastni* is used synonymously with the range of "third age" people. We will here be using the term in the second sense.

Interest in the third age is growing in European countries. Above all, this interest is engendered by the growing proportion of this age group and the growing life expectancy of this group. Consequently, the social influence of the group may be said to be growing. There are now cases when a person will have received a pension for longer than his/her length of service. The growth in number of people in this age group is a result of two parallel processes. **On the one hand**, due to developments in medicine and the enhanced access to medical services, improved living conditions and living standards in general, **the average life span is growing** and the upper limit of active life is rising. **On the other hand**, in all European countries the fertility model is changing, **the number of children borne by one woman is decreasing**, and there is a resulting general decline in the birth rate, which is changing the ratio between the three age groups.

It is hard to say whether there is a demographic dependency between these two processes, but it is a fact that the group of third age persons is growing in Europe.

Hence There Are Several Paradoxes

The first paradox of the current demographic situation is that the traditional process of age reproduction has been upset. With the growing share of persons beyond working age, the share of persons of active working age is declining; the natural reproduction of the human potential is affected by the smaller "first age" recruitment. The age pyramid is being turned upside down and this

imposes greater demands and a greater load on the "shrinking" part of the active population.

The **second paradox** is that in the upper age groups of people of active age, we observe a "premature aging" due to their incapacity to adapt to the rapid innovation processes and the fact that the economic reconstruction of the country is **throwing them out** of the sphere of active work. The internal restructuring of the "second age" is sending a growing number of recruitments to the "third age", even before their chronological term has come.

With time, third age people require greater care and resources which must be produced by ever diminishing groups of the next generations. This problem is particularly acute in countries where the economic and general social crisis is deep and continuous. Bulgaria is such a country.

The **third paradox** is that a growing number of active people are engaged in solving a growing number of social problems of third age people, which, in a sense, is itself becoming a generator of work tasks for the already depleted active working contingents.

The **fourth paradox** concerns the fact that the decreasing participation of third age people in social life is combined with their growing importance in decision making due to their growing relative share in the total aggregate of the adult voting population.

The **fifth paradox** concerns the ambiguous situation where people past active working age are one-sidedly perceived as a group mostly needing to be cared for, not as a group with positive potential, one that could make a real contribution to society. In fact, this rather large group of people, among its other characteristics, has a positive potential and its creative capacity must be used for the development of society. Social activity and a meaningful life are very important for society as a whole, no less than for the mental and physical health of the elderly and of the populations connected with them.

Despite the growing attention of society, representatives of the third age are seeking their own solutions, in different ways in each country, but always towards an active presence in society.

Considering the **specific case** of Bulgaria¹ and the Bulgarian village, we see that these general conclusions hold true, but there are some features specific to Bulgaria which need to be interpreted.

¹ The conclusions, data and results used in this article are from research projects and empirical sociological surveys conducted under the leadership or with the active participation of the authors: "The Economics of the Rural Household" (1992, 1994, 1996), an international project coordinated by prof. Mieke Meurs, American University

The demographic pyramid is turned upside down in rural Bulgaria and the share of the third age is growing ever wider. The causes of this have frequently been analysed and can be reduced to the following:

- continuing migration from village to city and, in the last decade, emigration to foreign countries, which mostly involves the young generation, are depleting villages;
- the birthrate is constantly declining in both cities and villages; so is the fertility rate — in other words, the number of children a woman of fertile age bears is sharply declining in villages as well, and is approaching one (the fertility coefficient of rural women is even higher than that of urban women, but the difference is growing smaller);
- the share of the third age group in villages is also growing by a constant stream of migrants from city to village; these are people of mature active age or early and late pension age.

The listed causes are mutually dependent so that it is hard to distinguish separate impacts. Processes in our country are largely similar to those observed in other European areas and other urbanised or urbanising regions of the planet.

Here are some of the **most general features** of the demographic picture of the Bulgarian rural population.

Out of the entire population of Bulgaria in 2006, less than 30% are rural inhabitants, but these are only the people permanently registered as village residents. However, they are unevenly distributed in more than 4 thousand settlements classified as villages. There is in addition a **territorial division** with regard to which rural inhabitants can be measured: the division into municipalities. From this viewpoint we see that the rural population is represented in different ways in the separate territorial-administrative units, and this means its role is not the same in the functioning of separate **municipalities**². This leads us

in Washington; "The Bulgarian and Agricultural Labour" (1994–1996); "The Family Farm, a Support for the Rural Household in Time of Transition" (1997–1999); "The Potential of the Rural Household" (1998–2000); "The Long Third Age" (2002–2004); "The Development of Municipalities in Bulgaria" (2002–2004); **Statistical Yearbooks of the Republic of Bulgaria**, which give comprehensive data on the demographic structure in Bulgaria.

² In Bulgaria the **municipality** is "the lowest territorial-administrative unit by which local government is exercised. A municipality includes the central settlement (village or city) and several villages (in some cases there may be as many as several dozen). The data cited further in this text are from the survey "Development of Municipalities in Bulgaria" (2002–2005). Of all 262 municipalities in Bulgaria, 200 were studies.

to the conclusion that the importance of the third age group is different in the different municipalities. In our sample (comprising nearly 80% of all municipalities in the country) there were only 2 municipalities with an entirely urban population. In all the others there was some share of rural population. In 20% of the municipalities there was an **entirely rural population** (the central settlement of the municipality was also a village). In 46% of all municipalities in the country the rural population was predominant. In 3/4 of the municipalities with a prevalently rural population, the size of the population was up to 10 thousand people. In municipalities whose **central settlement was a large city**, the urban population was predominant.

In only 4 of the surveyed municipalities third age rural persons are within the range of 6 to 12%. In nearly 14% of the municipalities the elderly rural population is over half of all inhabitants. In about 1/3 of the municipalities elderly people are about 36% to 50% of the rural residents.

In changing our perspective and focusing on the share of people up to the age of 18 in the rural population of Bulgarian municipalities, we see that in about 19% of the municipalities young people are under 12% of the rural population in those municipalities. In about 35% of the municipalities the share of the rural young is between 12 and 17%.

A new view of the ratio between young and old in villages reveals that in 16% of the municipalities old people are more than three times as numerous as the young, and in about 50% of all municipalities old people are between two and three times more numerous than the young.

The data of our surveys show not only that among the rural population of Bulgaria the third age group is increasingly predominant, being situated in all regions of the country, but also that this category of people is the **defining** part of the population in a large share of the municipalities. Regrettably these are municipalities with low economic potential and a low capacity for self-financing and self-development. A vicious circle is formed, where the economically weak municipalities are obliged to solve the problems related to the inactive population, which is moreover concentrated in settlements with a less developed infrastructure and fewer possibilities of caring for elderly people. The weaker the general potential for development of a municipality, the greater the share of elderly people living in villages there.

In thinking about the paradoxes of the "third age" in rural Bulgaria, we looked for the positive effects of the process of "rural aging" and the stream of "return migrants", who have spent the active part of their lives in an urban environment.

When assessing the Bulgarian case we should consider foremost the deep change in the Bulgarian village. The reference here is not so much to the village as a social organism and fixed environment, not to changes stemming from the modernisation of social life, the urbanisation of living conditions, the forms of work and the building of rural territory, etc. but to the change, the substitution itself of the social subject.

The present-day rural community proves to be a dynamic system, whose units have been socialised more or less outside the rural context and with the constant influence of the non-rural context.

Many inhabitants of almost every contemporary Bulgarian village are **autochthonous**: in other words, they or their parents (ancestors) or at least their spouses are indigenous to the village where they live, but a very small (and increasingly smaller) number of them have always lived, studied and worked in **this village alone**. Non-representative surveys in separate villages have shown that nearly every rural household has members who have migrated for longer or shorter periods to other settlements (and in recent years, outside Bulgaria). In a sense, most rural dwellers are "return migrants" (all the more so if we take into consideration the 30% of able-bodied rural dwellers who have been "commuting migrants", living in the village while working in the city).

Perhaps this is where the **first paradox** of Bulgarian rurality lies.

The young leave the villages and seek professional fulfilment in urban areas; but in their mature active age and at retirement, the "Odysseus syndrome" seems to work and they begin to consider variants for returning to the village, everyone seeking his Ithaca.

This means that the village only reproduces itself naturally to a small degree (only 17% of rural dwellers are under 18), while it grows increasingly due to the stream of return.

Since 1989, 14.1% of rural households have grown due to births, and 21.6% have decreased due to deaths³.

Only 12% of the rural households expect to grow⁴ in the near future, 7.2% expect a son-in-law or daughter-in-law to join them, and only 3.5% of the rural households expect growth through childbirth.

Of course there are also many people returning to the villages, who will create new households in their old ancestral homes or in newly bought village houses. The category of urban dwellers who have decided to live in villages but

³ These shares only refer to large households. They do not include households that have "disappeared" due to the death of all members, facts that we encountered when we used old samples of repeated surveys.

⁴ The survey "Potential of the Rural Household", 1998–2000.

are not related to the local rural community has not been very well studied. This group will grow as the number of foreigners buying houses in villages grows. This is another topic for consideration: the number of third age people in Bulgarian villages will be increased by pensioners from foreign countries.

An analysis of the group of people living in villages shows that it varies in respect to age but predominantly consists of people past the zenith of their active working lives.

Here are the percentages of age groups of people moving to villages (according to the opinions of respondents concerning their own village).

Predominantly young:	2.8%
Predominantly people of pre-pension age and "young pensioners"	17.9%
Predominantly early pension age	10.4%
Predominantly pensioners	39.6%
Very old	1.4%
People of various ages	27.9%

This variety shows that returning migrants provide a social potential for active village life. They are very often the creative core of local life.

Hence we must conclude that elderly people are quite important for the functioning of the village — if not for its natural reproduction, at least for the presence of permanent inhabitants.

Does the village gain by the fact that the number of elderly people living there is growing due to a permanent stream of returning migrants? Are these people likely to create new problems? What is the balance between positive and negative in the impact of these people?

A simple and categorical answer is hardly possible.

Most people opting for returning to the village are those who have ancestral roots in the village, or whose childhood and early youth were connected with the village. They do not choose just any village, but **their own** village, where their native house is or was, where their parents live or once lived.

There are, of course, quite a few exceptions.

Among these exceptions there are quite a few intellectuals who have chosen the village due to some ideal motives.

In about 2/3 of the cases of return migration of elderly people, the decision was based on economic causes:

— they want to make room for their children who have families of their own in the relatively small urban dwelling;

- it is cheaper to live in a village;
- working on the family farm will contribute to solving the financial problems of the elderly and, to some degree, of their children in the city;
- possibilities of temporary employment may be found in the village, such as providing services for others, performing craft work, etc.

In **another group** of cases, moral and other non-material motives are combined, for instance:

- the desire to live closer to nature;
- seeking more frequent contact with relatives and friends and closer communication;
- seeking ways of new fulfilment;
- caring for elderly parents;
- seeking opportunities for greater social activity, etc.

This list can be continued. Behind every concrete case there is a life story and specific causes for the choice made, but in all cases there is a lurking question: "What is there for me to do in the city?" Human nature demands activity.

It is important to note that the permanent residents and the new groups of people soon form a **united community** because old friendships and neighbourly ties are quickly revived.

This heterogeneous community of third age people, including both permanent village inhabitants and new and renewing permanent inhabitants or temporary rural inhabitants, has a positive impact for maintaining a basis of **permanent habitation** in the village and for keeping the doors of rural houses open. Even those who only live there part of the year or periodically, contribute to maintaining the rhythm of life in the village. They create a spirit of inhabitability and social bond.

This is especially evident in large villages with a thousand inhabitants or more. In these villages, although the group of people above active age is sometimes several times larger than those under active age, the very stability of habitation provides a considerable presence of young people, and thus, a normal functioning of the village organism. In fact, elderly people provide a minimum of constant inhabitability of the village.

The growing importance of third age people for the life of the village is the cause of **another paradox**.

- The start of the third age in the village is not perceived as a slow finale of a life, but as a **new start**, the beginning of a **new cycle**. No matter how long this cycle is, it is important that people seek a **new way of making life meaningful**, a new internal structuring of their third age.

Whether urban or rural, these pensioners all begin with the desire for some kind of change, in terms of the order of their existence, their work occupation and social activity. The main thing is the desire for a **new start**, which structures the group internally. The internal age division and activity are determined by their health and social "openness". Up to the age of 70 they usually consider themselves young pensioners. The mature and active are aged between 70 and 80. Above 80 they gradually start to withdraw from active life, but do as much as they can to make this withdrawal slow and unnoticeable.

— Regardless of their profession before retirement, when entering the third age they start or become more active in (according to where they have lived previously, in the city or village) **agricultural work** on the family farm. They mainly produce for themselves, for relatives and friends living in the city, but also to some extent for selling on the market and earning an additional income.

— This **feeling of making a new start** is evident in the attitude to the most cherished space, the house and yard. They begin to modernise their old home or build a new one, the elements of everyday life are made closer to the urban ones, but quite often ways are sought for harmonising the traditional and the modern. This depends on the mental patterns, personal taste and artistic maturity, imagination and skill and, of course, on financial means.

It is **paradoxical**, yet true, that the **compensatory functions** of the reproduction of the rural settlement organism are assumed by the least reproductive group. Through these **compensatory functions** they somehow try to make up for the lack of normal natural reproduction of the social potential.

— the birth of a child in a village is now a rare event, but the existence of open houses makes it possible for children to spend some time there periodically, creates the possibility for seasonal or holiday rejuvenation of the village.

— Village inhabitants and their guests create conditions for maintaining the rural infrastructure and the balance of activities other than agricultural by enlarging the circle of consumption.

— Living in the village brings life to the inhabited environment and makes it attractive for new settlers or for rural tourism.

— Third age people maintain horizontal social networks in the village, but also vertical networks, passing on their knowledge and information to the next generations about families, events, sites and natural phenomena, technologies and techniques that are being forgotten.

When discussing the role of the third age for the survival of the village as a social system, we should bear in mind some other paradoxes, which complicate the assessment of the social group and the social attention that it should be receiving.

An important point is that, as mentioned, the relative share of third age people is growing thanks to return migrants who **do not always register as rural dwellers**. This process influences the social structuring within the group and builds a new type of social network, in the village and between the village and the city. The group of pensioners living in the village practically includes more representatives of the upper scales of the social stratification than there are in the lower age groups. This is yet **another paradox: specific elites** are gathered in villages, people who adapt to a village life that they have forgotten or have never known.

— This category includes many persons with secondary or higher education. Some of them enjoyed a rather high social status before retiring, while others are parents (or grandparents) of persons who now have a high social status. Many of them could be classified as an elite, were it not for their present financial situation. According to data of the empirical survey "The Potential of the Rural Household"⁵, about 30% of all university graduates living in villages are pensioners.

— These are people with great practical social experience, practice in organisational work, leadership skills and important achievements in the field of culture and science, holding positions in the currently functioning networks of social relationships at different levels, including the highest. With such characteristics they can be a practical **bridge** between the village and the city, the urban and the rural, the traditional and the modern. Among this group there are people who esteem and strive to preserve what is valuable from the vanishing tradition, thus nourishing the impulses to local identification.

— These are often pensioners with relatively high pensions, and consequently a relatively higher capacity for maintaining some infrastructural elements.

Hence their greater social activity in some villages, which has an influence on stimulating the components of development in the concrete place.

— Although being in the **third age**, they often have impulses to innovational positions whereby they exert an influence towards animating and activating the social life of the village.

— They also exert an influence by organising cultural events for carrying over urban intellectual potential to the village.

They maintain the traditions of local amateur artistic activities and stimulate presenting such activities outside the village; they attract young people to participate and pass on their experience.

⁵ A survey "Potential of the Rural Household", conducted by the authors in the period 1998–2000 with a sample of 806 rural households in 100 villages across the entire country; we here refer to the aggregate of 2423 people, all members of the surveyed households, including children.

- They promote the gathering of materials about the locality, create and renew exhibition collections, publicise local achievements, provoke the interest of society at large in the respective village.

They remain the basic element for initiating and organising local cultural life.

- Rural pensioners' clubs often prove to be the most animated of all cultural formations.

It is unnecessary but possible to continue this list of local cultural forms and spaces, which exist due to the efforts of third age people.

This somewhat optimistic picture based on the compensatory role of the representatives of the third age, is **not the whole picture**.

It is a composite picture, including elements of what is happening in different, separate villages. Perhaps there is no one place where all this is present simultaneously, but there are quite a few villages where some of the elements mentioned exist.

But this is only part of the problem.

- The rich intellectual potential of people living in villages is not put to full use. In some cases local organisational structures have no idea how to achieve this but at times the local authorities do not want the informal authority of such people to expand and do not support the initiatives and willingness for participation in public life, thereby confirming the rule that "no one is a prophet in his own native village".

- This problem may also arise when elderly people themselves are inactive. They expect to be approached by others, waiting for someone to organise the forms of activity whereby they could be useful.

- There are no facilities in the village adequate to modern living standards.

- The Internet is not only important for the young but for the old, but Internet services and email in villages are more expensive and difficult to obtain than in the city.

- There are hardly any forms connected with the idea of "life-long learning".

- The capacities of certain donor programmes for including qualified third age people, are not being used.

- Conditions for better connectedness with the world are not being built with funding from the municipal budget and donor organisations — including Internet, good TV coverage, support for connecting cable TV, etc.

- Such traditional organisations as the cultural centres for providing newspapers, new books and other sources of current information, organising meetings, talks and other forms of cultural activity are also insufficiently used.

But most important of all is the fact that we are dealing with **third age people**.

- Making a new start in early retirement and the feeling of having enough energy for various activities can lead to an excessive burden going beyond the potential of these people and resulting in health problems.

- Often the capacity, knowledge and skills for agricultural work and the scale of farming undertaken lead to disappointment and stress due to the inability of coping with these tasks.

- Social activity is not always displayed, due to the inability to master the rules of modern communication, which are very different from what they used to be. An elderly person can remain withdrawn because s/he does not find ways for inclusion in the existing social networks.

- There are variants of conscious isolation, enclosure in personal space, loneliness, fear of old age, helplessness, marginalisation.

- We observe where cultural habits are gradually given up, domestic duties abandoned, especially when there are no relatives and friends to support, encourage, assist or show understanding. This happens especially after the loss of a partner with whom the person has spent his/her life.

The rural population leads an active life to an advanced age, but when the life potential is exhausted, there are not enough flexible forms for coping with daily problems.

Elderly people living in villages require a wide range of health services, but the current organisation of healthcare in Bulgaria makes access to regular medical aid complicated. Elderly people find it hard to cope with the difficulties ensuing from age itself. They need not only food and care for their physical survival, but also support and someone to talk to and share their thoughts with.

The third age in rural areas undergoes all the hardships of rural residents of any age, that results from the social situation in Bulgaria in general. But the third age has its specific problems. The very process of aging makes these people especially sensitive but also responsible, because they understand that to some degree they are responsible not only for themselves, but also for the hope of survival of the village.

The city and urban spaces attract the young, provide them with greater chances for fulfilment, education, work, recreation, encountering a potential marriage partner. Young people often choose to move to the city, even when their childhood and early youth have been closely connected with a village.

The village and rural spaces become a haven when youth is over and the third age is approaching or has come. This is perhaps because it offers an alternative occupation or because it is easier to make ends meet there or because it provides

a possibility for helping the young. Maybe because people are attracted by their childhood memories.

Perhaps a little of all these.

One thing is beyond doubt: the growing proportion of elderly people requires a new model of social support, one which takes into account their positive potential, their limited financial capacity and all the hardships of age itself.

These are problems that can probably be addressed by non-governmental organisations, associations of elderly people dealing with the problems that give meaning to life in the third age, a time of life that can seem so long.

The solution lies in dealing correctly with two sets of problems:

- **firstly**, stimulating the personal potential of the group as a whole and of the separate individuals so as to motivate their full participation in public life;
- **secondly**, caring for these people without condescension, with thoughtfulness, material support and moral empathy.

Connecting these two groups of problems is the main paradox of the third age in rural Bulgaria.

Here we have not discussed a **new paradox**, which has recently become evident in the Bulgarian village. There is a new group of people "inserting" itself in the rural community, namely foreigners who have purchased houses in Bulgarian villages. We have yet to see to what extent these people, divided from the local population by language barriers and cultural stereotypes, will become part of the local community, what their influence will be, how much they will impart a new vitality in the processes of Europeanisation and globalisation. It is indisputable however, that this is a phenomenon deserving observation and study.

Perhaps these are not all paradoxes but the logic of development of the social subject in the duration of the life cycle in the context of late modernity. Perhaps post-modern globalism will offer new situations for analysis in which we will seek the specific place of the village.