



Article

Retirement Is a Foreign Country: Work beyond Retirement and Elder Care in Socialist Bulgaria

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Abstract: In this article, I investigate state policies in socialist rule in Bulgaria, encouraging pensioners to work beyond retirement and their impact on eldercare. First, I argue that in the 1970s, Bulgarian pensioners began occupying economic niches similar to those of labor migrants in Western Europe. The policies actively promoting work after retirement were introduced in parallel with legislation encouraging older people to distribute their property among potential heirs as a donation instead of their last will. I argue that this combination of work beyond retirement and inheritance patterns had a negative impact on eldercare and should be taken into consideration when designing new policies addressed at working pensioners. The research is based on letters of complaint or denunciation from the 1970s, available in the Bulgarian State Archives.

Keywords: work beyond retirement; elder care; age and gender; kinship and state

1. Introduction: Work beyond Retirement and Eldercare. Lessons from Socialist Bulgaria

Work beyond retirement is an increasingly common practice in contemporary Europe, and a new consensus has formed across the continent that the trend is a long-term one, due to the general aging of European societies and requires a reappraisal of work and retirement policies (Reday-Mulvey 2005, pp. 3-4). A significant body of research is being accumulated on motives to work after reaching pension age or after receiving the pension, on the relative importance of education, health, gender, and marital status, or the type of employment and job position when deciding to keep working after retirement in several European countries (see Dingemans et al. 2016 for a cross-country analysis). The combined trends of declining fertility and increasing life expectancy provoke a constant interest in the cross-cultural analysis of eldercare, such as the magisterial three-volume study edited by Patrick Heady (Heady 2010), combining quantitative and qualitative approaches. This article could be situated at the intersection between studies on work beyond retirement and eldercare because it presents how different types of work after retirement had an impact on gender representations in socialist Bulgaria and, by consequence, on eldercare in a society that relied on and still relies mostly on family for providing care to elderly people. The parallel study of state policies and kinship could bring important insights into the social history of South-East Europe, as demonstrated in the pioneering works of Tatjana Thelen (Read and Thelen 2007; Thelen and Alber 2018), and the type of archival data that I use could be interesting for a historian of socialism in Europe.

These data come from letters sent to a daily newspaper by Bulgarian citizens and preserved in the Central State Archives as fund N 1520, collection "Editors of the newspaper Rabotnichesko Delo—reader's letters 1968–1974". Generally, they fall under the category of letters of complaint and denunciation, which citizens sent to socialist state institutions in East Europe. The practice was very common and generated an enormous number of documents, so impressive that even Sheila Fitzpatrick attempted only a general classification of the types of messages sent to Soviet institutional bodies in the 1930s (Fitzpatrick 1996). These letters were so ubiquitous that they were discarded from the Bulgarian state archives, and only a small collection, not systematized yet, is preserved,



Citation: Iliev, Ilia. 2022. Retirement Is a Foreign Country: Work beyond Retirement and Elder Care in Socialist Bulgaria. *Genealogy* 6: 65. https://doi.org/10.3390/genealogy6030065

Received: 14 May 2022 Accepted: 12 July 2022 Published: 17 July 2022

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namely, letters sent to Rabotnichesko delo, the official daily newspaper of the Bulgarian Communist Party. The newspaper acted as an intermediary between the letter-writers and other Bulgarian institutions and often requested verification, written answers, and explanations from municipal or state offices. As a rule, the institutions reacted promptly because the newspaper, being affiliated with the ruling Communist Party, and its editor-in-chief, being a full member of its Political Bureau, was positioned higher in the Bulgarian institutional hierarchies in the 1970s. Characteristically, only the police or army sometimes refused to cooperate, answering that the matter falls in the competence of military prosecutor offices. The letters were very rarely published, always in the framework of a larger public campaign, and after painstaking investigation, including contacts with all parties concerned, written confirmation of the facts by local institutions, and personal visits to journalists from the newspaper. But 99% of the letters were never published and apparently were not intended for publication by the people who wrote them. As a genre, they have little to do with letters to the editor in a French context, as studied by Boltanski (2012), because they were not an attempt to mobilize public support against some injustice or for some noble cause. They were closer to the letters analyzed by Vera Dunham in her landmark study on middlebrow literature in Stalin's time (Dunham 1976). Although the letters to the editor discussed by Vera Dunham deal with fictional characters and situations, and readers' reactions to them, whereas letters to Rabotnichesko delo deal with real people and verifiable facts, they share some common traits. Both types of letters provide a safe and harmless channel of communication between citizens and authorities. A channel harmless to the authorities because, unlike trade unions, non-governmental organizations, political parties, or any form of grassroots organization, it left the citizens alone and atomized. As any modern state, socialist Bulgaria needed realistic feedback from the citizens and these letters provided such.

The sources that I use have obvious shortcomings because they presuppose some degree of literacy, willingness to communicate with the authorities, and natural optimism that a particular case could be solved in a beneficiary way for the writer, but still are one of the best chances to get a direct insight into the everyday life of socialist Bulgaria.

2. The Case of "Abandoned" Father

In 1974, Rabotnichesko delo published a dramatic story about an elderly man "abandoned" by his son in a specialized institution for aged people, the son not only failing to visit him regularly but even refusing to pay a symbolic amount of money for his upkeep. The journalist claimed that this was not a single case and that there were other old men in similar situations. Very soon, dozens of angry readers began bombarding the publishers and editorial board with letters. Some of them were demanding quick justice for the culprit, and one or two of them were published because it was obviously a public campaign for naming and shaming. Others, equally angry, failed to blame the expected culprit and were not published—as one anonymous writer argued, since the state confiscated the lands and the money of the elderly people, it should also take care of them. Actually, a copy of this particular letter was sent to the police with a request for further investigation. But there were still other letters, which required further information about the particular situation in this family and whether there were other heirs. The unworthy son also sent a letter (which was not published) where he argued that his parents transferred the family house and garden to his sister as a donation, so it should be her who pays. One month later, another newspaper Zemedelsko zname, presented a similar report on an old man left alone in his village house. The journalist had interviewed local people, familiar with the particular case investigated, and her dramatic question, "is it moral to leave elderly parents alone", often received a cold answer, "the person who got the house, should pay now".

It was a public campaign, and each newspaper publication provoked a quick reaction with dozens of letters. Several of them quoted dramatic examples of abandoned elderly men and women, mostly men. There were even more letters—hundreds, actually—from old people who had transferred their apartments or houses to one of their children as

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a donation, under the condition that they would be supported when old and helpless, and complained that the heir had abandoned them. The courts were of little use in these particular cases. The only thing they could do was to hope that an act of public shaming would change the situation, and once or twice such letters were published. In parallel, as I.K. indicates in a letter from 5.08.1974 "Every evening we see on TV many sons and daughters who rejected their fathers and mothers, abandoned them in nursing homes, and even refuse to visit them".

It seems that in Bulgaria in the 1970s existed a systemic problem—old people were abandoned by their children without support, and it was somehow related to inheritance patterns because apparently, there were heirs who received the heritage in advance and quickly forgot their moral duties. There were also tensions between privileged and discarded siblings. To understand the processes that brought this crisis, a more detailed account of the policy changes related to elderly people in the 1970s is necessary.

3. Working Pensioners: Hardworking Men and Housewives

After the rural exodus from 1958 to 1972, arguable the most important change in policies addressed to old people was that they were actively encouraged by the authorities to work beyond retirement. After the adoption of the Pensions Act in 1957, the retirement age for mass category three became 60 years for men and 55 for women, and they were allowed to retire with 25 and 20 years of service, respectively (Koleva 2002, p. 74). Demographic trends clearly indicated that the number of retirees would only increase, and in the 1960s researchers began considering retirees as a labor resource whose potential is not fully exhausted after retirement. Minko Minkov, a leading gerontologist, proposed the new term "residual working capacity" to describe the employment potential of retirees. Other new terms from the 1960s were "semi-productive" age groups, which refer to pensioners aged 60-69 and students aged 15-19, "starting old age", which indicates the age immediately after retirement, in contrast to the "real" old age between 70 and 80, and then the "deep" old age (Najdenova et al. 2009, p. 87). The researchers found that in the period of early old age, between 60 and 69 years, "the elderly still retain a significant part of their ability to work and can participate in social production" (Minov 1976, p. 267). Ultimately, the conclusions are that there is potential for the use of older people as a labor resource. In her analysis on biographical trajectories during socialism, Daniela Koleva also points out the areas where retirees could officially work. These were agriculture and forestry, construction, mining, and heavy industry (Koleva 2002, pp. 75-76). Older people employed in these fields could receive both a pension and a salary. The positive stimuli were combined with negative ones—most of the pensions were extremely low. Because Bulgaria was mostly a rural country before the urban exodus, the peasants did not pay any contributions to the social system before the mass collectivization of land that ended in 1958, and, therefore, were entitled only to minimal pensions for age. So, they had to keep working.

The complaints, denunciations, and simply the readers' letters from the cited archival collection expand this picture. Along with the possibilities officially stipulated in the pension legislation, the pensioners had the opportunity to do something resembling private business or, in the terminology of the time, to work "privately". This was regulated with an ordinance from 1974, "Ordinance for artisan and commercial activities of the citizens", which allowed retired people to engage in such activities if there was no state or municipal institution providing such services locally. A letter from D.N., a 75-year-old pensioner, offers a summary, "In the first half of February the newspaper published an ordinance, which says, to put it shortly, that the fit and healthy pensioners can work everything without prejudice for their rights and pension, and even to stay employed full time. This demonstrates in first place that in Bulgaria unlike the capitalist countries there is no unemployment, but shortage of labor".

In a letter dated 24 December 1973, Dr. K.S. from Sofia (signed with initials) defends the right of citizens "to consult privately with their former acquaintance, preferred, family doctor" after their retirement. As it is clear from correspondence from 1973, N.N. from the

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town of Shumen worked as a cooper after reaching retirement age and had a complicated relationship with Koopmebel, as he was pressured to work officially and not "privately" in the cooperative. Or G.M.'s ex-wife sent a letter of denunciation informing that he still produced brushes in a shop in the Knyazhevo district, Sofia. An anonymous N.I. from Plovdiv wrote on 16 June 1973 that "citizen S. B., a tailor by profession, currently works as a private individual in the city center ... Citizen B. has two pensions—one is a people's pension and the other is due to illness, a total of over 120 leva". "P.P. from Varna, 67, complained of obstacles he faced in extending his permit to sell peanuts, in a letter from 1973. T.Y. of Yambol, 70, also had problems with his permit to sell "small goods", as evidenced by a letter to the editors from 31 July 1973. I.M. sent a letter of denunciation from Vidin on 9 December 1974 stating there were three retired men working in a municipal office as cashiers and inspectors. A group of nurses from Lom sent letters in July 1973, protesting that the hospital made unlawful deductions from their salaries after retirement. A.P. from Kukorevo complained that the local authorities prohibited him from working as a glazier because they intended to offer this as a public service, but meanwhile, there would be no glazier, public nor private, in the village. Other letters and denunciations mention pensioner-craftsmen, producers of household goods, low or high-skilled services—from carters to doctors, as well as people who have difficulty entering traditional qualifications, such as a traditional healer from Lom or a camel owner, who had problems with traffic police when moving his herd to touristic sea resorts.

Fund N. 1520 also contains some of the institutions' responses to denunciations of pensioners working "privately". It is noteworthy that the institutions were lenient towards the elderly and the only serious exception was when they were accused of hiring additional workers or, in the terminology of the time, exploiting someone else's labor, i.e., being capitalists. Such denunciations were checked, and the violators were sanctioned indeed. For example, P.K. from Razlog was caught using a hired driver for his Zhiguli car in 1974, and his trader permission was immediately canceled. Thus, two types of opportunities for employment of retirees emerged in the 1970s—one officially regulated and encouraged by the state through the ability to receive both pensions and salaries in certain areas, and another where the state neither encouraged nor prohibited retirees "to work privately". In socialist Bulgaria, where people of working age were expected to be employed in the state economy, such leniency meant a lot. But all these options were open mostly to men.

Opportunities for retired women apparently were more limited. As Prof. Minkov explained, "As for older women, those over 50, their job placement is considered a difficult and insufficiently effective, so we will not dwell on it. We will point out only that they have enough opportunities in the household, in the personal farm and in helping young people to raise children" (Minkov 1984, p. 284). With the exception of agriculture, which relied heavily on the work of older women (Koleva 2002, p. 76), retired women were encouraged to look after grandchildren. The labor legislation from 1985 equated the grandmother with the biological mother, giving the elderly woman the right to maternity leave if she wished to replace the biological mother. Letters from readers to *Rabotnichesko delo* show that, if necessary, grandmothers were encouraged to look after their grandchildren in quite a straightforward manner. For example, from a letter dated 5 May 1976, the Ministry of Public Health responded to a request from the newspaper in connection with a reader's complaint that a school doctor had refused to give a mother leave to care for a sick child, "because she knows the child has a grandmother". In response, the above-mentioned grandmother, A.B. explained, "I am a grandmother indeed. But I live on the other side of Sofia and I have heart disease and rheumatism. When they were small, I took care of them, but now they are of school age and they can't live with me".

Apparently, the combined official and informal encouragement for elderly women to work as domestic help was largely successful. Statistics on the budget of time from the last decade of socialism in Bulgaria indicate that recently retired women were the age group that spent the most time housekeeping, cooking, cleaning, babysitting, and waiting in queues—many times more than young mothers or women of working age (Stajkov

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1984, pp. 219, 242–47). For men, the cost of a long career in areas requiring hard manual labor may be seen in statistics reflecting a sudden increase in male mortality between ages 65 and 69 (Golemanov 2004, pp. 85–91) in the 1970s. Other statistics from the 1970s indicate that after agriculture, construction became the field attracting the oldest workforce (Stefanov et al. 1974, p. 338), mostly men (Stefanov et al. 1974, pp. 319–20).

State policies in the 1970s constructed radically different images of older men and women. Men were supposed to be active and useful outside the household, while older women were placed at the heart of the family. Radically different messages were also addressed to younger and older generations. The propaganda aimed at young and middle generations sought to emphasize gender equality and insisted on building the image of the "new" socialist man and woman, equality between spouses, equality and interchangeability between men and women in their employment and in the family (Brunnbauer 2010). At the messages directed at the elderly presented women staying in the kitchen, shopping and caring for the children, and men working outside hard real jobs. Thus, two sets of mutually contradictory gender images circulated, addressed respectively to the younger and older generations. These contradictions provoke the question of how consistent the policy of building a "new socialist man" was and whether its failure, as Ulf Brunbauer argues (Brunnbauer 2010; see also Brunnbauer and Kassabova 2012; Brunnbauer and Taylor 2012), was due to the government's inability to pursue its planned policies, or if actually there was a pragmatic approach instead, and the authorities looked for cheap labor.

Whatever the reason, in the last decades of socialism in Bulgaria, retirees were encouraged to occupy the same niches as their contemporary labor migrants in Western Europe. Heavy industry, agriculture, mining, and construction were the areas where elderly men in Bulgaria and work migrants in West Europe could excel. Older women were encouraged to occupy the niche of domestic helpers and to take care of children, cooking, cleaning, and general housekeeping—like many Bulgarian women today, who are work migrants in the more developed parts of the EU (Chevalier 2010, p. 295). Maybe each affluent society needed some easily accessible sources of low-paid labor, and in the Bulgarian case, these were the elderly.

4. Inheritance and Eldercare

These transformations of images of elderly people went in parallel with another piece of legislation in socialist Bulgaria. This one related to property and inheritance. In 1973, a Law on Citizens' Property was adopted, regulating the maximal amount of real estate an individual or family could possess—one urban flat, or one country house, and a small summer house outside urban boundaries. A bit earlier, in 1968 the regulations were tightened regarding the so-called reserved part of the heritage—property, which was guaranteed to the surviving spouses and children in equal shares. All this disturbed a system of inheritance and eldercare, typical for traditional Bulgarian society, where the heir who provided care to elderly parents or relatives was expected to receive a larger share of the family estate.

This was a traditional model for the entire Bulgarian ethnic territory and is found among other European nations. It was described in detail more than a century ago by Stefan Bobchev, according to whom elderly people could choose between two solutions—either to keep the family property undivided until their death and then leave the heirs to negotiate the division of inheritance, or to divide it between children and stay with the youngest son (Bobchev 1902, pp. 74–83). If the elderly mother outlived the father, then the division was mandatory, and she remained with the youngest son (Bobchev 1902, p. 129). The Bulgarian ethnographer tended to idealize the patriarchal family (for a detailed analysis, see Kassabova-Dintcheva 2002, pp. 57–132) but realized that early distribution of property carried certain risks for the elderly. An example of this is the story he quoted about the man who divided all his property among the children and was abandoned by them as a reward. However, a clever man advised him to carry with him everywhere a large horn, which his sons and daughters-in-law thought was full of gold and began to care for the

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old man again. After his death, they found a note in the horn "Whoever gives his sons his livelihood, to put this horn in..." (Bobchev 1902, p. 72). Therefore, even in the case of an early division of family property between the heirs, the practice was for the elderly to keep part of the property for themselves and then to award it as an additional part of the inheritance to the child who looked after them—usually the youngest. As a rule, this was the house, but it could also include fields and vineyards. "This is done so that the fathers and mothers are not abandoned in old age" (Bobchev 1902, pp. 83, 79, 206). In case the preferred heir does not take good care of the adults, "the father, as long as he lives, may change his decision" (Bobchev 1902, pp. 113-14). Another late 19-century ethnographer, Dimitar Marinov goes even further. "Come on... I can take even one Gypsy for a son to look after me". His interlocutor answered the question of what he would do if his sons did not take care of him in the old days (Marinov 1995, p. 112). Both 19-century ethnographers directly linked the care of the elderly with some additional part of the heritage. Not a small one—the family house, plus that part of the heritage that the elders decided to leave for themselves during the division. To them, it seemed obvious that caring for parents was a job deserving reward.

The official legislation in Bulgaria gradually changed this traditional arrangement, refusing a larger share to the heir who had cared for the elderly. This began with the Family and Inheritance laws in 1889. The changes of 1906, 1949, 1968, 1985, and 1992 regulated differently the shares of male and female spouses and heirs, expanded or narrowed the circle of relatives entitled to a reserved share, as well as widows and widowers, but nowhere was it mentioned that the descendant who took care of the elderly parents had the right to the house or to an additional part of the real estate (for a detailed analysis see Tsankova 1994, pp. 13–20, 32; Tasev 2000, pp. 16–17, 35, 50, 79–80). The only advantage that the caregivers had was that they received the household items from the family home, provided that they had lived with their parents (Tsankova 1994, pp. 85–86; Tasev 2000, pp. 107–8). However, informal arrangements were possible to reach mutual satisfaction until the 1970s, when the new law of Citizens' Property was adopted, and the rural exodus largely destroyed the traditional village communities, which had some tools for moral control and sanctions, however limited they were.

Under the new conditions, the elderly no longer had the opportunity to reward a privileged heir with a larger share of the inheritance as remuneration for caring for them, as the Citizens' Property Act from 1973 restricted both their property and that of the heirs. This deprived them of perhaps the most powerful tool, the legacy, to guarantee eldercare. At the same time, the new images of pensioners as people who were morally obliged to work and had opportunities to do so largely relieved the moral obligations of young people to care for elderly parents.

5. Discussion

In order to receive help, old people need first to be conceptualized as needing and deserving it, and Bulgarian cases from the 1970s indicate that working beyond retirement could problematize the way how pensioners are perceived by the younger generations. Old men were encouraged to work in domains requiring physical strength and endurance, or at least some cunning, and work policies, academic research, and propaganda presented them as fully able to care for themselves. Logically, their children felt fewer moral obligations to help them even when help was really needed.

The elderly women were in a more beneficiary position because the socialist state encouraged them to provide domestic help, including childcare, to the younger generations, and thus to stay at the center of family life. However, the process was not so smooth and involved a new conceptualization of domestic work, care, and more generally grandmotherhood. Historically, the concept of the grandmother as a nurturer is relatively new in Europe and is related to demographic trends like declining fertility and increased longevity (Thelen and Leutloff-Grandits 2010, pp. 428–29). Before the rural exodus, childcare was provided mostly by mothers or older siblings in Bulgaria. The fact that grandmothers

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became actively involved in raising their grandchildren was not a logical continuity of pre-existing patterns but a relatively new mass phenomenon for Bulgaria, which was shaped by state policies. The shaping involved a different conceptualization of eldercare and childcare. Raising children was conceptualized as "work", which is a very important category in Marxist ideology and practice, and, therefore, involved remuneration and welfare protection. Mothers, or grandmothers if the latter ones were official providers of childcare, received social transfers and pension benefits. This was fully in line with the texts of Marx, Engels, and Lenin, who clearly conceptualized any domestic work as "work" in the strict sense of the word. On the other hand, in the 1970s, the Bulgarian state conceptualized eldercare as "care", a moral duty whose fulfillment cannot be controlled by institutions and which does not imply remuneration, welfare transfers, nor benefits. The public campaigns of naming and shaming, mentioned above, could not force reluctant children to care for their parents, as it is obvious from the flat refusal of the unworthy son in his unpublished letter to *Rabotnichesko delo*.

The new conceptualization of childcare as work on the one hand, and eldercare as moral duty on the other, opposed existing practices in Bulgarian society. As it was demonstrated in traditional inheritance practices, living with and caring for one's parents was considered work, deserving proper remuneration in traditional Bulgarian law, whereas maternal love and care for children was conceived as a moral imperative, which did not involve any material remuneration. Grandmothers were less negatively affected by this new arrangement because it maintained and even strengthened their relations with the younger generations, and thus they could rely more on them for help in deep old age. Older men were in a more difficult situation because the new images circulated in socialist Bulgaria presented them as self-reliant. Moreover, contrary to the traditional expectations, older people in general were not able to provide remuneration in the form of a larger share of the inheritance.

6. Conclusions

In the 1970s, the family was the main provider of eldercare in Bulgaria as in other Balkan countries (Grandits 2010, p. 265) and as part of a larger pattern presented in much of South-East Europe and the Mediterranean region in the past. Bulgarian pensioners today have fairer pensions, but still rely on their children for support, as do the pensioners in neighboring Serbia (Thelen et al. 2014, p. 119). But even for most of Europe, elderly people remain net beneficiaries of family help (Gruber and Heady 2010, p. 97). On the other hand, there is an increasing trend for work beyond retirement in Europe, due to long-term demographic trends involving declining fertility and increasing longevity, and Bulgaria is not an exception.

Bulgarian cases from the 1970s, when work after retirement was actively encouraged by the state, provide useful insights on possible risks in societies, where elderly people rely on younger generations for help, especially when this help is considered solely a moral duty.

Funding: This research was funded by FNI, Ministry of Education, Bulgaria: KP 06-H45/4 from 30 November 2020.

Institutional Review Board Statement: Not applicable.

Informed Consent Statement: The research is based on archival documents. All human persons mentioned in the text are anonymized.

Data Availability Statement: The research is based on archival documents accessible at Central State Archives, Bulgaria, fund N 1520, collection "Editors of the newspaper Rabotnichesko Delo—reader's letters 1968–1974".

Conflicts of Interest: The author declares no conflict of interest.

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