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THE ETHNIC GEOGRAPHICAL FEATURES OF POPULATION
AGING IN BULGARIA AT THE BEGINNING OF THE 21ST
CENTURY

(Séance / Session 3)

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The Ethnic Geographical Features of Population Aging in Bulgaria at the Beginning of the 21st Century

Les caractéristiques géographiques ethniques du vieillissement de la population en Bulgarie au début du XXIe siècle

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Abstract

At the beginning of the 3rd millennium the low rates of natural increase has arisen as a problem to be solved only in European countries. However, there are differences within the continent in the patterns of the demographic transition: while stagnating rates have been observed in the Western European countries since the 1980s, the Eastern states have suffered large decrease in the population since the crisis and the fall of the Eastern Bloc. The low birth rates having been typical for two decades foreshadow the deepening of the problem as they are accompanied by the process of aging.

Bulgaria is similar to the other post-communist countries in respect of demographic features; although natural decrease in population exceeds those of other European countries. This demographic crisis in itself puts a serious burden on the Bulgarian society; however, behind the regional inequalities there are also ethnical and religious differences as well as economic reasons.

This paper aims to examine the reasons for decrease in population, aging and its territorial patterns as well as to describe the ethnic background of this problem.

Keywords: The Balkans, Bulgaria, population decrease, population aging, spatial and ethnic disparities

Résumé

Au début du 3e millénaire les faibles taux d'accroissement naturel de la population soulève un problème à résoudre seulement en Europe. Alors qu'il y a des différences continentales: des taux stagnantes sont caractéristiques de l'Europe de l'Ouest depuis les années 1980, les pays d'Europe de l'Est au contraire souffrent de la diminution rapide de la population depuis la crise et la dissociation du Bloc de l'Est. Les taux de natalité moins élevés devenaient typiques au cours des deux dernières décennies en Europe laissant prévoir l'aggravation du problème, puisqu'ils sont accompagnés par le processus du vieillissement.

Les caractéristiques démographiques de la Bulgarie ressemblent aux celles d'autres pays post-communistes, bien que l'accroissement démographique d'elle soit plus négatif. La situation impose une charge notable à la société bulgare, pourtant les inégalités spatiales s'expliquent aussi par des facteurs ethniques, religieux et existentiels.

Cet étude porte sur les raisons de la décroissance de la population, le vieillissement, le profil spatial, et puis sur la présentation de l'arrière-plan ethnique du problème.

Mots-clés: Les Balkans, Bulgarie, déclin démographique, vieillissement démographique, différences spatiales et ethniques

Introduction

Changes in population show great territorial differences in the World. While the task in underdeveloped countries is to ease problems caused by population explosion, in the developed world the new part of demographic transition and its following phenomena, population decrease is a growing challenge.

The demographic transition in post-socialist countries occurred rapidly, within few decades. Therefore the typical features of post-industrial societies have already appeared in age-structure, occupation structure and also in the number of births and deaths. But in these countries migration does not compensate, but rather strengthens the population decrease, which results from declining birth rates and higher number of deaths.

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Bulgaria is similar to the other post-communist countries in demographic features, but in respect of population decrease surpasses from other European states. This problem itself is a serious burden to the Bulgarian society, but there are ethnic and religious differences in addition to economic reasons behind the territorial disparities in population decrease.

The Balkans has got mixed ethnic pattern and changing country borders, therefore the changes in population has strategic meaning. It's especially true, when there are significant inequalities in natural increase among ethnic groups in a country. The main example is Kosovo, but there are many other places in South-Eastern Europe, where strained relations in society caused by the differences of population increase (BOTTLIK ZS. 2008A; CSAPLÁR-DEGOVICS K. 2007; KOCSIS K. 2007). This article would like to show only the Bulgarian problems. The goal of this work is to present the reasons of population decrease and aging, and to demonstrate the territorial aspects and ethnic background of these problems.

Database and Methods

This research is based on the results of censuses, published by the Bulgarian *National Statistical Institute* (NSI). The last census was in 2001, but data of smaller territorial units were published a few years later. Presentation of general demographic features and an international comparison was made by using publication series named "*Population*". The temporal comparison and the detailed analysis to LAU 1 level territorial units were made by the means of the 28 series of "*Census*", which were published up to 2006.

There are six regions on level NUTS 2 in Bulgaria, divided into 28 units, named *oblast* (level NUTS 3). The *obshtinas*, which are on level LAU 1, are the places of local governments (BOTTLIK ZS. 2008B; IVANOV S. ET AL. 2002). Obshtinas contain one or more settlements; their territory and population show large differences. The number of them has been changing continuously since the democratic transformation in 1989, therefore data comparison is quite difficult. Their number was 256 in 1992, but rose to 263 in 10 years time. The territorial base of this research is the administrative classification in 1992, because the data in 2001 can be added up among obshtinas.

The cartographic basis of this research was the map of "Ethnic structure of Southeastern Europe around 1992" by Peter Jordan (1995). Further source was the administrative atlas of Bulgaria, published in 2005. The pages of this map show the obshtinas of the 28 oblasts and every settlement within them, including their population number.

The collection and systematization of data was made by establishing a database, including every data, which can show the demographic situation in the country and the regional inequalities of population and the age structure. This database was integrated into a GIS system, which provides graphical presentation of demographic features and their territorial aspects. The database can be enlarged which makes further researches possible.

Changes in Population Number and the Process of Aging in Bulgaria in the Modern Era

Demographic Trends between 1878 and 1945

The Bulgarian State existed in the Middle Ages and later reappeared in the map of European countries after the Russian-Turkish war in 1877-1878. After the 500 years of Ottoman rule the young national state had many social problems. It was an underdeveloped Ottoman economic territory, where the majority of the population lived from agriculture. When the inhabitants liberated from the oppression, they expelled the Turkish landowners and wanted to obtain lands even with violent means. The government retreated from this social pressure; therefore agricultural production was carried out in small pieces of land.

The ethnic structure of the new country, like in other Balkan state, was not homogenous. Apart from its small ethnic groups (like Armenians, Greeks, Tatars, Jews), it had a large community of Muslims. The Bulgarian speaking Pomaks, and the Turks are heritage of the

Ottoman times. The former conquerors became excluded members of society. They were permanent target of the majority, because the young national Bulgarian state in the neighbourhood of forming Turkey considered them dangerous.

However, economic development could start in the background of this shortly outlined, strained social situation, because independence made it possible. The factors that made livelihood of inhabitants unstable in the Ottoman times disappeared, hygienic and social achievements spread. Bulgaria and its neighbours entered into a new part of demographic transition; a dynamic rise in population began (DONKOV, K. 1991). This population increase deepened the above mentioned social problems, because agriculture worked with low effectiveness and could not supply the growing population.

Bulgaria was on this involuntary path even between the World Wars. The majority of inhabitants did agricultural work as smallholders, while industrial development was slow; therefore the redundant agricultural manpower could not be employed as industrial workers in the cities. In the 1920s and 1930s the emigration of minorities was continuous. The Turkish communities remained in higher number only within their ethnic blocks. Most of them were the poorest stratum of society, living mainly from agricultural works.

Population increase was the highest in the Balkan states among European countries at that time, because of agricultural way of life and spread of civilization achievements, which caused high birth rates and low death rates. Living standards of inhabitants declined, because agriculture was based on smallholders and could not supply the growing population (JANOS, A.C. 2003). These factors hardened the strained relations of mixed ethnic structure.

The intensity of natural increase declined slowly from the 1920s on. There were differences in birth rates between the urban and the rural population. The number of births was lower among urban inhabitants due to changes in family planning, differences in living standards and in culture (DONKOV K. 1991).

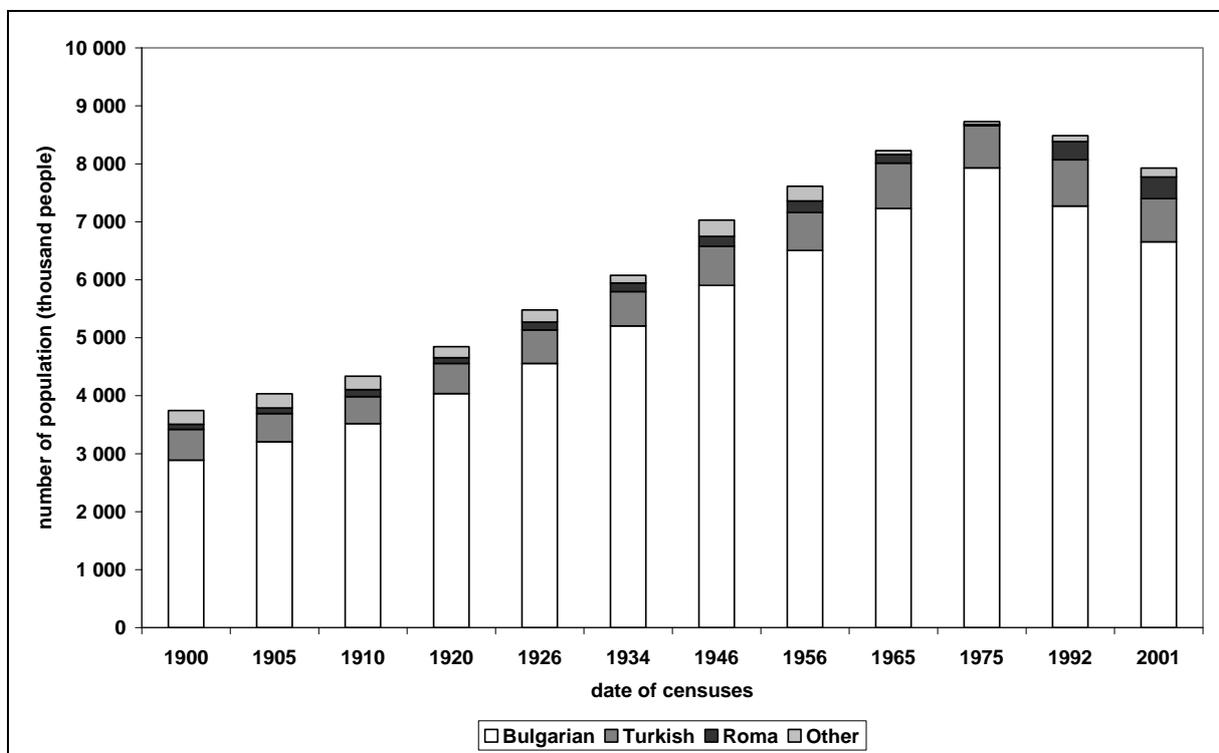


Figure 1 Changes in number of population and in ethnic proportion in Bulgaria during the 20th century. Source: NSI, Bulgaria

Demographic Features of the Communist Era

Radical changes in social structure occurred by the establishment of communism, after the Second World War. The communist regime announced a plan of radical transformation of the economy in the end of 1940s. The goal of this plan was the reduction of low-producing agriculture and fast development of heavy industry. Industrial investments in cities attracted the rural manpower, and the peasants were willing to move from villages to cities due to violent collectivization.

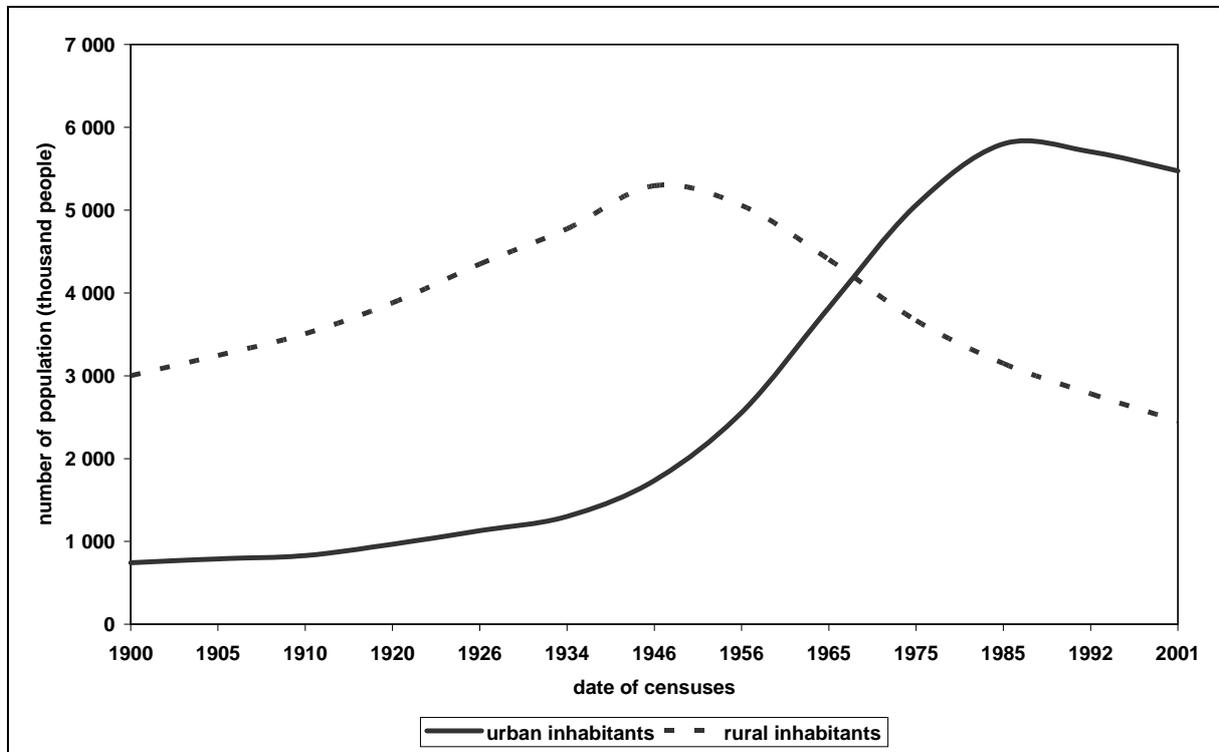


Figure 2 Changes in number of urban and rural inhabitants in Bulgaria during the 20th century. Source: NSI, Bulgaria.

The most effective, violent nationalization in Bulgaria was aimed at ethnic Turks, therefore emigration to the neighbouring Turkish state increased. But Turkey could not receive the masses of refugees, therefore closed its borders from time to time and set a limit to the number of resettles (CRAMPTON, R. J. 1987).

A certain amount of decline was noticeable in the number of other minorities at that time in Bulgaria. Most of the Jewish minority moved to the forming Israel, and Armenians were also leaving the country continuously. The treaty between Yugoslavia and Bulgaria was a radical solution of the Macedon question: Bulgarians accepted the independent Macedonia, but denied the existence of Macedonians within its borders (BOTTLIK ZS. 2007). The Muslim Bulgarian speaking Pomaks were considered Bulgarians because of their language; therefore they were not counted as minority.

The changes in population caused tension between minorities and the majority also in the second part of the 20th century. Structural transformation of the economy caused the transformation of the society, which was noticeable in declining population. In the 1980s communist politics had to face the fact that the population number of Bulgaria showed declining tendency. The causes of this, similarly to other countries in the Eastern Block, are in connection with the fast changes.

Mainly young, more mobile groups joined to the migration from villages to cities; therefore the age structure also changed in rural territories. This ageing caused decline in fertility in those regions, where opposite tendencies had been experienced before. In the first

part of the communist era population increase was lower in the villages than in the cities (DONKOV, K. 1991). Mainly people between 15 and 40 joined the migration, therefore the phenomena of population aging appeared early in rural territories. Mainly older people remained in villages, therefore the number of births declined (RANGELOVA, R. 2003).

However, radical changes in living standards occurred in the life of the younger population that had flowed into the cities. These changes slowed down natural increase. The main reason for this was the extensive employment of women (DINEV L. – MISHEV K. 1981). When the importance of professional knowledge increased and learning time became longer by the development of the educational system, this tendency became stronger. These tendencies were opposite with the traditional large family model. Crowded household, lack of assistance and the new family model, where both husband and wife work, made child-keeping more difficult, because most grandparents stayed in the villages; they could not help to look after their grandchildren (TAAFFE, R. N. 1990). Higher costs of urban living and child-keeping made the situation harder.

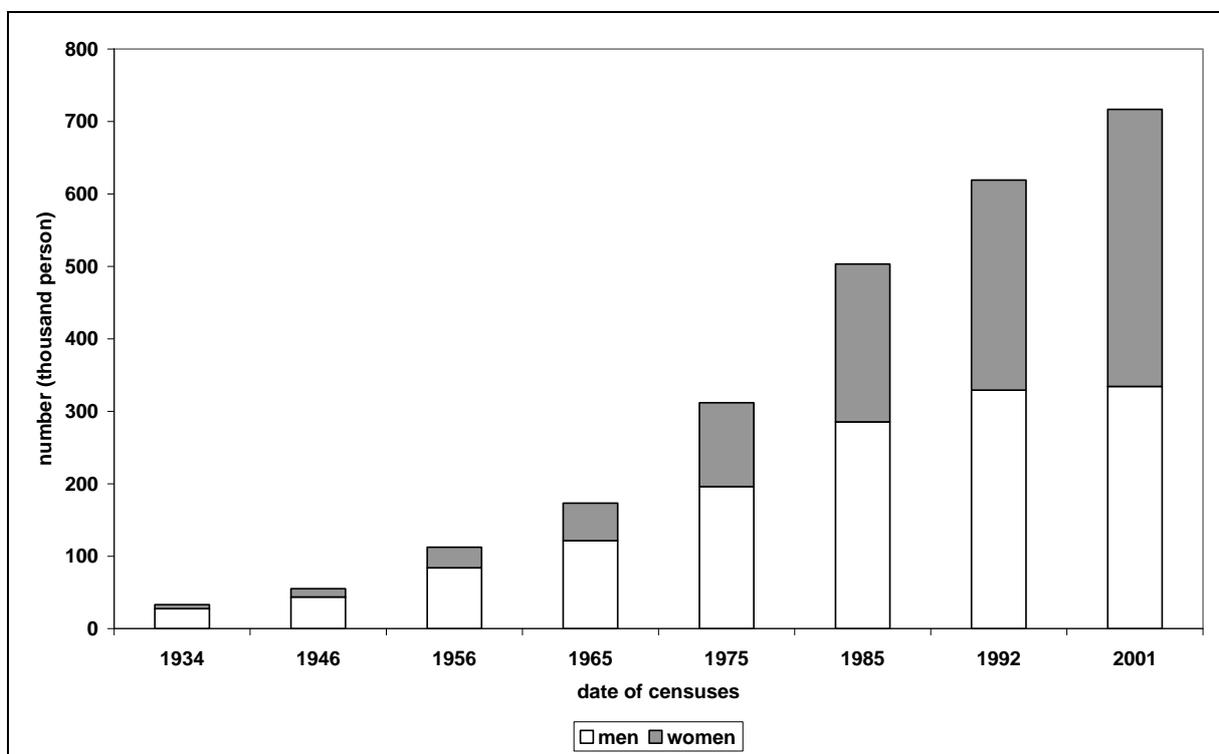


Figure 3 Changes in number of participants in higher education during the 20th century. Source: NSI, Bulgaria

In addition to the decline in number of births, the decline in number of deaths was slower. Therefore after 1965, when the number of births was extremely low in the country, the population increase could not compensate the lack of births. This tendency became stronger from the end of the 1960s, when the number of deaths increased.

The negative changes in age-structure became more significant, because larger age groups became older and the younger age groups were less in number than the previous ones. A long term decline in birth rates strengthened due to population aging.

Statistics showed that the decline was smaller among Muslim inhabitants than Christians. If a religious community is a marginalized minority, the inequalities between birth rates are significant (like in Kosovo; CHAIME J. 1981). The Muslim minority in Bulgaria did not take part in the great migration processes from rural to urban territories in the communist era.

The Turks, the Pomaks, the Tatars, and the Roma who lived together with the Turks, traditionally did agricultural activities and stayed in their traditional jobs, therefore their

younger members did not move to the cities. The fertile age groups stayed in their original places; therefore they missed the effects of urban living. A little decline was noticeable in birth rates among them, but it was smaller.

The communist regime wanted to solve this problem in the 1980s, when the “revival process” started. They decided to prove, that Muslim inhabitants are Slavs, who had been forced to convert to Islam, therefore they had to be returned to “their roots”. The leaders aimed to enlarge the number of ethnic Bulgarians with this process. Their mosques, schools were closed, their press was banned, the use of Turkish language was restricted in public places. They were forced to change their Muslim names to Bulgarian ones. These steps caused the exodus of 350 thousand Turks from Bulgaria to Turkey in 1989. After the fall of communism the above provisions were cancelled, therefore those Turks who did not succeed in Turkey (the one third of the emigrants) returned to their homes (EMINOV, A. 1999; LOZANOVA G. ET AL. 2005; MAHON, M. 1999; ZHELYAZKOVA, A. 2001).

The communist regime also tried other, less drastic, methods to stop population decrease. They took several social-politic measures, but the only achievement they could make smaller fluctuation. The population showed permanent decline (TAAFFE, R. N. 1990).

Demographic Features of Bulgaria at the Turn of the Millennium

International Comparison and the Social Situation after 1989

After the fall of communism in 1989, a new period began with faster demographic changes in Bulgaria, similar to other post-communist countries. The Bulgarian population shows outstanding population decrease in comparison to EU 15 countries, which is the result of economic and social changes happening during the political transformation. The economic and social crisis in the 1980s, which was followed by the collapse of the central leading economic system in 1989, left their marks on demographic processes. Their effects on the last decade of the 20th century can be demonstrated by the data of censuses. However, Bulgaria has lower values in population decrease among the other new members of the EU. The reasons can be found in local features.

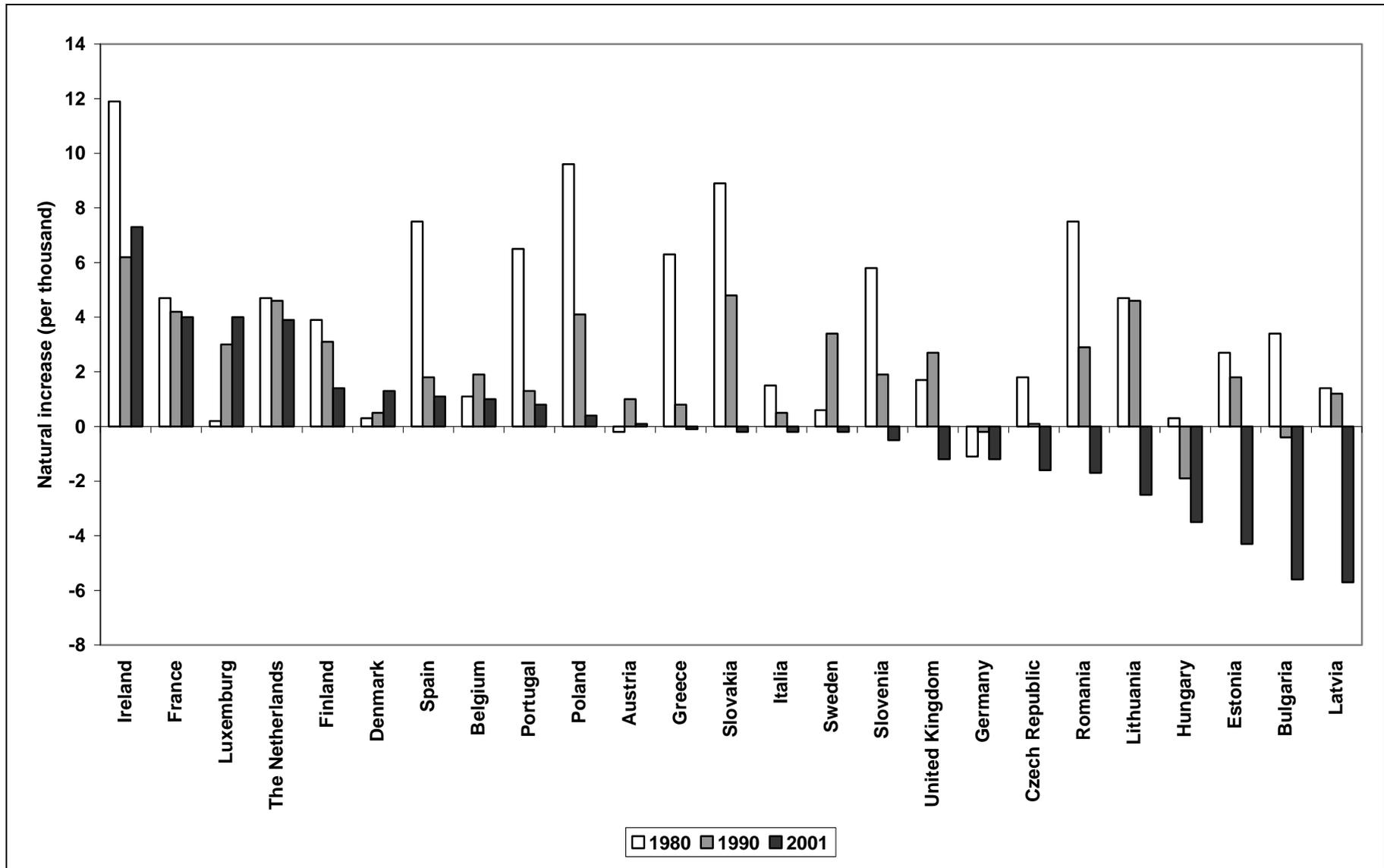


Figure 4 The rate of natural increase in the EU countries (except Cyprus and Malta). Source: NSI, Bulgaria

The radical economic and social changes caused total economic collapse in the beginning of the 1990s. The effects of this are still noticeable in the demographic situation of the society. Between the last two censuses the Bulgarian population decreased with 6.57%. The reasons for this are both increasing migration and natural decrease. After the political transformation the borders were reopened. The continuing economic crisis motivated the inhabitants to leave their homeland and move to mainly West-European and overseas countries. The main participants of this emigration and foreign employment were the younger age groups, therefore the number of births became fewer in Bulgaria (HRISTOV, E. – BALEVA, I. 2001). In the year of democratic transformation the emigration of several fertile Turkish groups caused higher decrease, because mainly younger Turks tried to find their new life in Turkey.

Increase in higher education, and extensive presence of female workers in the competitive sector postponed the age of maternity, which strengthened the population decline. The number of younger age-groups decreased; therefore age structure has changed: there is a shift to older age groups (RANGELOVA, R. 2003). The emigration of younger people caused disproportionate age structure among the people in years of employment. This makes it harder to change economic situation (HRISTOV E. – BALEVA, I. 2001).

The economic crisis has resulted in low living standard in Bulgaria. Every third citizen of the country live under the poverty line (RANGELOVA, R. 2003). The two greatest minority of Bulgaria, the Turks and Roma peoples can be found among the poorest population groups. Those ethnics, who live in rural territories in traditional large families and missed the transformation, are less mobile members of the society, therefore their marginalization can be observed in the post-communist period. The Pomaks, who live in the valleys of Rhodope are in the same way, but according to public Bulgarian point of view they are not minorities, therefore they are not included in Bulgarian publications.

Regional Inequalities in Changes of Population Number

The regional inequality of population decrease is the result of natural decrease and migration from rural to urban territories. The highest decrease can be seen near the borders and in settlements of less developing inner territories. Latter settlements show less decrease, because these places are the homes of the Muslim minority, where the higher birth rates compensate migration.

The decrease is exceptionally high near the north-western and the western border of the country and in the south-eastern territories next to the Turkish border. The lowest rates are in oblast Kardzhali, which is the most underdeveloped territory in Bulgaria. The inhabitants of the region are mainly Turks, who tend to move to other places, where the living standards are higher. Within the inner territories of the country the decrease is above 20% in two obshtinas, which are in traffic shadow, therefore their inhabitants search for their living in other places.

Migration processes effect less decrease in the main settlements, because these cities are the target places of manpower-flow. However, population increase can be seen only in Varna and in Kozloduy. Population increase around cities refers to suburbanization processes. The migration of urban inhabitants to the nearby smaller settlements is the most significant near Sofia, Varna and Aksakovo. Beside them it occurs in lower rates near Plovdiv.

The rate of decrease is lower near the Black Sea. These obshtinas are the destinations of labour because of developing tourism. The same reason caused the decrease in the south-western side of the country. Plovdiv and its surroundings are the target of migration because of its economic importance. The developing cities of the north-eastern region show lower decreasing tendency. It is important to stress, that in the cities and in their surroundings, especially between Sofia and Plovdiv the higher proportion of Roma inhabitants and their higher birth rates contribute to the lower decrease of population.

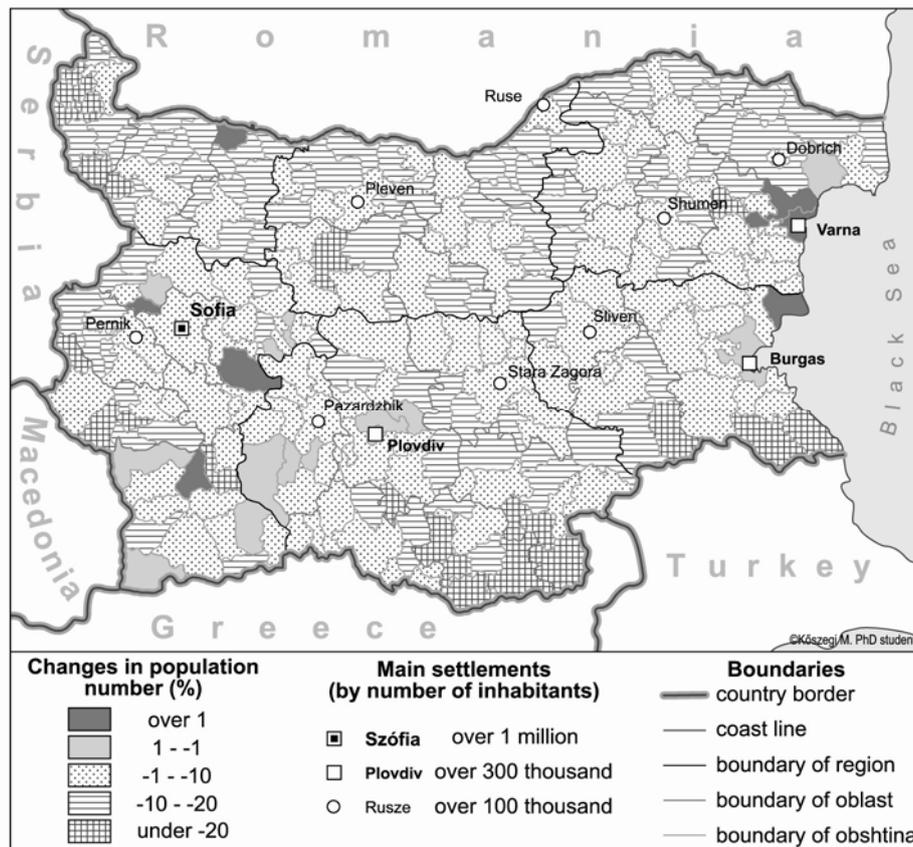


Figure 5 Changes in number of population in LAU 1 level territories (obshtinas) of Bulgaria (1992-2001). Source: NSI, Bulgaria

Regional inequalities of Population Aging

In the years of transition the tendencies in changes of age-structure during the second half of the 20th century, became stronger. The territorial features of the processes mentioned above are worth to examine. The ageing index is a characteristic ratio of population aging, which helps us to create models to the progress of aging processes in the examined territories (obshtinas). This index shows the proportion of younger (under 15 years) and older (above 60 years) age groups compared to each other. If its value is above 1, the number of older people is higher than younger people, so the age structure shifted towards people above 60 years.

In 1992 its value was above 1 in 174 obshtinas out of the 256. In 59 obshtinas the number of older people was twice as high as the younger. Near the north-western borders and in the underdeveloped obshtinas in traffic shadow the proportion of older people compared to younger is outstandingly high. Migration from the north-western territories of the country is continuous, which causes deformed age structure in that region.

Obshtinas where the number of young people is higher than the number of old ones are different from the most nationwide values. These obshtinas are the homelands of ethnic minorities. The 30 obshtinas with outstandingly low (under 0.7) values are situated in the territory of Rhodope, which is the main region of the Muslim minorities. Oblast Kardzhali, which lies in the East Rhodope, is one of the compact ethnic zones of Turks in Bulgaria, it is also the most underdeveloped territory of the country. In the western valleys of the mountains the index is low in those obshtinas, where the Turkish minorities live. Oblast Smolyan, the zone of Bulgarian speaking Muslims (Pomaks) also shows younger age structure.

The higher rates of younger age groups compared to older can also be found in the north-eastern region of Bulgaria, where another ethnic zone of Turks is situated. Ruse, Pleven,

Sliven and Stara Zagora obshtinas are also the homeland of Muslims, but besides Turks, Roma inhabitants are significant in number in those obshtinas. The value of the aging index is lower near the Balkan Mountains and in its basins, where the traditional territory of the Roma lies.

Near the Black Sea the age structure is more proportional, because this territory shows dynamic development, therefore attract young employees. The values of the index show favorable age structure in those obshtinas, where the ethnic Bulgarians are in minority, and are underdeveloped from economic point of view. In these regions the number of agricultural workers is higher, which made possible for the traditional family structure to remain.

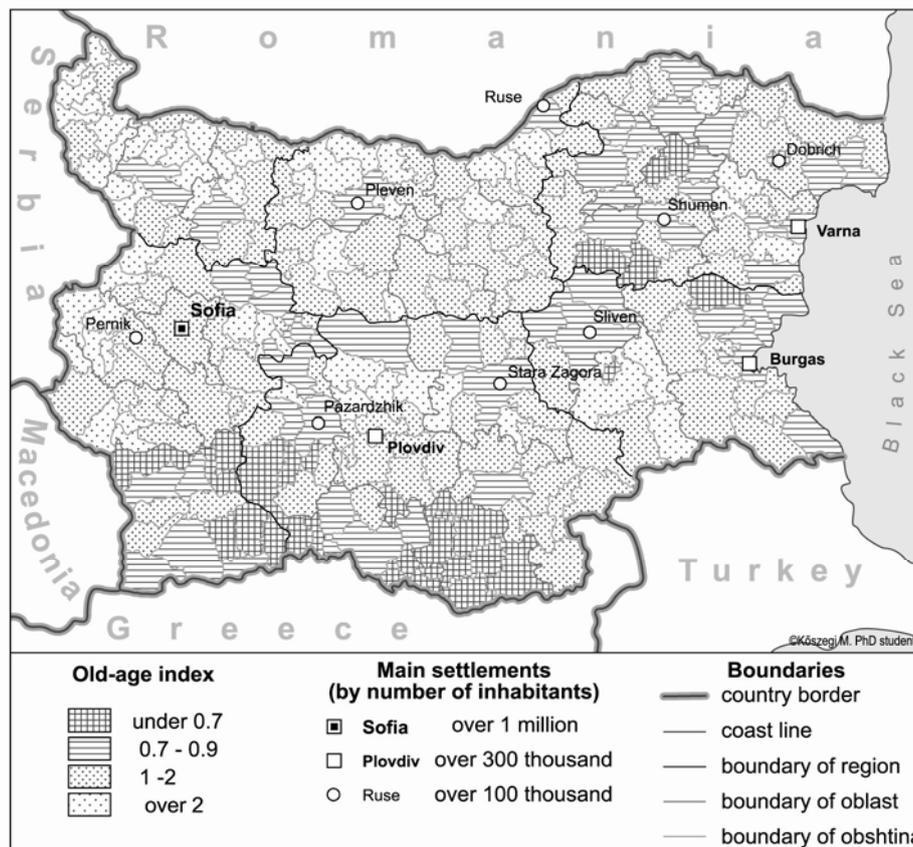


Figure 6 The rates of population aging in LAU 1 level territories of Bulgaria (obshtinas) in 1992
Source: NSI, Bulgaria

The values of indexes created from data of the 2001 census show a changed picture. The proportion of older people is higher than younger in 227 obshtinas from the 256. In 87 obshtinas the people above 60 years are twice as many as people under 15 years. Migration from the North Western part of the country continued. Mainly younger age groups suffered drastic decrease, therefore in some obshtinas the elders are ten times as many as younger people.

The tendency of aging became more significant in obshtinas near Sofia next to the western borders, which indicates migration of younger people to the capital. The values of aging also grew near the city of Plovdiv, and in the Thracian plain. The proportion of the elderly is also higher in the north-eastern part of the country, and next to the Turkish border, which shows migration from this underdeveloped territory. The territories in traffic shadow in the middle of the Bulgarian Plain, and in the obshtinas next to north-eastern border had the same problems.

In 2001 the proportion of younger age groups was higher in 29 obshtinas. The decline in birth rates became significant even in the Muslim communities, like in the Rhodope Mountain

and in the North East territories of the country. The value of old-age index is still the lowest in Turkish territories: in the villages of the Western Rhodope, in the eastern part of the mountains in the settlements of oblast Kardzhali, and in the north-eastern region, in the villages near Shumen and in the valleys of the eastern part of the Balkan Mountains.

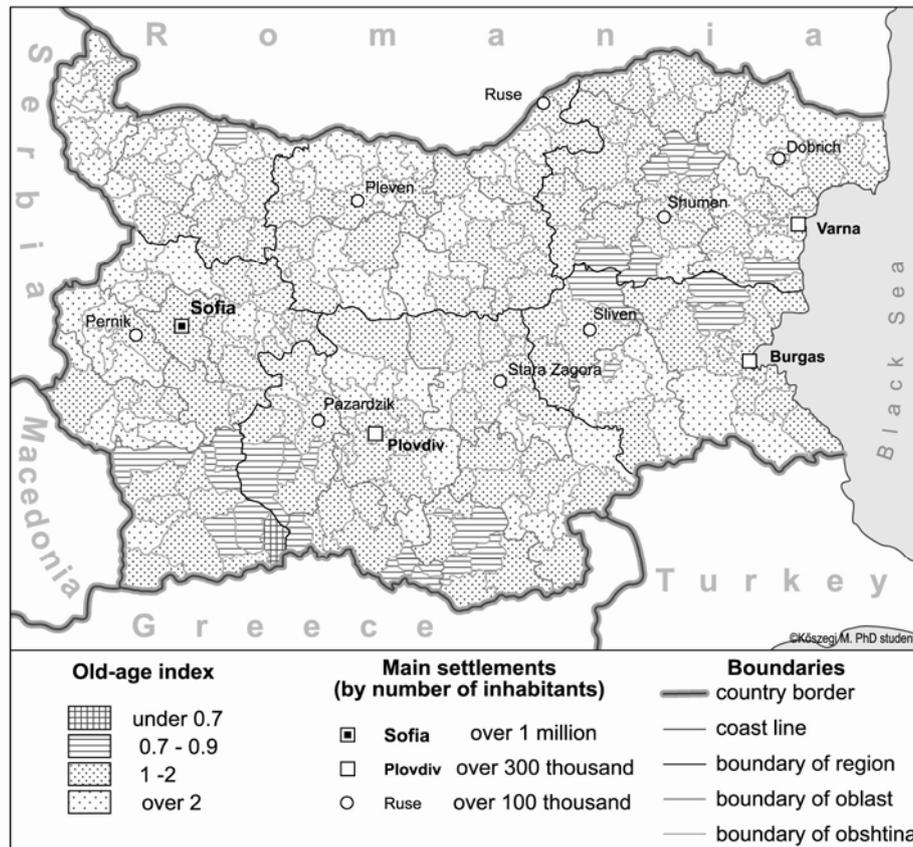


Figure 7 The rates of population aging in LAU 1 level territories of Bulgaria (obshtinas) in 2001
Source: NSI, Bulgaria

In the years of transformation significant changes happened in age structure, which caused changes in the proportion of the younger and the elder people. It is worth to examine the changes in the proportion of both age groups from the whole population between 1992 and 2001, because the processes mentioned above can be specified.

The number of the younger age group decreased significantly everywhere, except in two obshtinas. In 60 obshtinas of the country the value of decrease was above 30%. These settlements are in the western part of the country near the border. Addition to this, drastic decrease can also be seen in the southern territories of the Turkish minority. The crisis of agriculture and tobacco growing made the situation harder for people without qualification living from agricultural seasonal work, as it can be seen in the drastic decline of younger people in this region.

If we examine the changes in proportion of younger age groups we can show the situation clearer: the greatest loser of the country is the region of the Rhodope Mountains, which shows, that migration from this territory was the highest. The decrease is the highest in the settlements of oblast Kardzhali and Smolyan. The higher birth rates, which are typical among Muslim inhabitants, turned into negative direction in the post-communist period, therefore the differences between the majority and the Muslim minorities (mainly Turkish and Pomak) became less significant.

The stagnant values mean positive tendency in proportion of younger people. These values can be found in the obshtinas of traditional Roma territories: in the north-eastern part of the Balkan Mountains, in the central part of the Bulgarian Plain. Roma inhabitants have the youngest age structure.

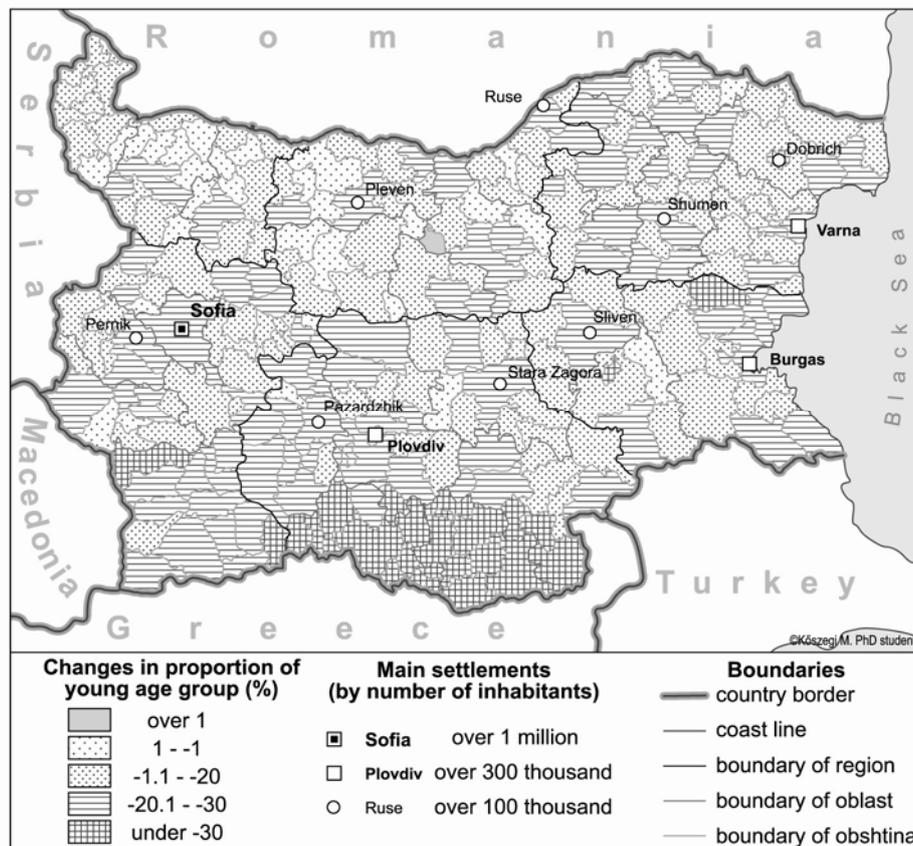


Figure 8 Changes in proportion of the young age-group in LAU 1 level territories of Bulgaria (1992-2001). Source: NSI, Bulgaria

The changes in the number and the proportion of the elder age groups strengthen the tendencies mentioned above. The number of elders became higher in 115 obshtinas out of 256. In 43 obshtinas the decrease of their number was above 10%. Obshtinas showing significant increase are in the Rhodope Mountains, in the south-western side of the country. It can be stated, that age structure changed the most unfavourably among the inhabitants of this area. The situation of the most underdeveloped region of the country is worsened during the post-communist years, and society made its reaction to this process.

The changes in the population of the elder age groups within the whole population show increase in almost the whole territory of the country. Their proportion decreased only in 32 obshtinas, far north from the Balkan Mountain in those territories, where the proportion of Roma inhabitants is higher. The most significant decrease in proportion occurs in the territory of Kardzhali oblast and next to the western and the southern borders.

Conclusion

Bulgarian society has extremely unfavourable demographic features in the beginning of the 21st century. After the partially overcoming the difficulties caused by the political transformation, as a member of the European Union improvement in population increase is expected, but even in spite of population growth Bulgaria will have stagnant population among the countries.

The transformation of the society that took place in the Western-European countries for centuries happened less than one century in Bulgaria – similarly to the other post-communist countries. The rate of transformation was especially high in a country, which liberated from 500 year Ottoman rule and had extremely underdeveloped agricultural society. This country carried out forced industrialization and social structure change as the most eager member of the communist bloc. Bulgaria was the most accessible country to the Soviet Union because of its history and its geographical location; therefore the fall of the communist block deeply affected the country. The crisis in the 1990s left deep effects in the Bulgarian society, which is shown by the extremely decreasing population.

The state, threatened by the death of the nation, has many challenges in the beginning of the new millennium. Emigration and decrease in birth rates have to be solved with effective state interference and the aging population must be provided more effective social care. It is essential to ease strained social relations, to face the situation of the minorities and to make certain that they integrate into the major society.

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