

The graying periphery - aging and community development in Romania and Bulgaria

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Abstract

Aging is one of the most significant challenges for European countries. While the impact of aging on community well-being has been part of the development and policy discourse in Western Europe, it is a relatively new problem for the new EU member states in Eastern Europe. Aging here is accelerating rapidly due to the plummeting fertility rates and significant outmigration at the national level. At the same time, subnational differences in aging also increase, mainly facilitated by urban expansion and immigration which leaves rural communities without present day revenues and future prospects for population replacement.

This study focuses on the patterns of the aging processes in Romania and Bulgaria discussing how local socioeconomic characteristics, development legacies and local cultures influence the policy challenges of aging. Analyzing both EU level and national statistics supported by in-depth data collection we use community case studies to reveal the links between demographic processes, community development and policy measures. Since aging is not a random pattern but connected to other forms of spatial inequalities, most of the Eastern European countryside faces dramatic problems of perpetuated decline at the same time when state and local capacity appears insufficient to handle the challenges. This study addresses the future of rural communities in Eastern Europe through their demographic trajectory and community capacity in the context of EU efforts for regional cohesion.

Extended abstract

Defined as an increasing proportion of people age 65 and above, population aging is a general demographic trend in postindustrial societies. It has a number of socioeconomic implications both at the national and local levels of social organization, such as a depletion of the retirement and health system, as well as an impact on further demographic change, elderly well-being, poverty, community development and economic growth. Aging occurs unevenly in space, and it is interlinked with other forms of spatial inequalities. Outmigration of young generations, shrinking workforce, declining businesses and local revenues, as well as the increasing burden on the healthcare and other social services can push communities into a viscous cycle of decline.

There are mainly two components of population aging. One is *aging in place* represented by the fact that more and more people survive to ages 65 and above due to increased longevity. The other is *retirement migration* occurring when retirees move to particular regions and places based on residential preferences. Research showed that although both components have an impact on rural aging in developed countries (Fuguitt et al, 1989), retirement destinations are not evenly spread out, but rather concentrate in

high amenity regions (King et al, 1998; Johnson and Beale, 2002). While aging in place contributes to the above mentioned challenges of local development, retirement migration does not necessarily change the age structure as retirees generate demand for additional services which in turn induces immigration of those in the active workforce.

There is a significant scholarship on the challenges and trends of aging in developed countries, however, much less have been written about the same phenomenon in Eastern Europe. Some early articles commented on the age structure of Eastern Europe in comparison to Western Europe (Coleman, 1993), the US Census Bureau published a report on aging in Eastern Europe and the former Soviet Union (Velkoff and Kinsella, 1993), but all these studies were based on pre-1990 data and could not account for the tremendous socio-demographic transformation of the region during the past 15 years. One of the most comprehensive work on contemporary Eastern European demographics, written by Tomas Kucera and his colleagues (Kucera et al, 2000) has indications of the process of aging itself, but it does not discuss its development policy implications.

Eastern Europe can be considered as a postindustrial region, seemingly on the same demographic track as most the Western European countries, a converging path acknowledged by some scholars (Monnier and Rychtarikova, 1992) but debated by others (Tomka 2002). The relative absence of retirement migration, the cultural and social norms associated with situation of elderly people in this region, and the legacies of past development patterns all mediate demographic processes, resulting in specific socioeconomic outcomes in various places.

Focusing on the patterns of the aging processes in Romania and Bulgaria, this study seeks to highlight how local socioeconomic characteristics, development legacies and local cultures influence the policy challenges of aging in the two recently joined members of the European Union. While we discuss the long term trends in the context of aging in the region, our study focus will be on the rural areas that are generally disproportionately negatively affected by the demographic and economic processes in these countries. Some of the research questions that we will answer in this study are:

1. What are the basic sociodemographic trends of aging in Eastern Europe in the last 50 years?
2. What are the social norms, roles and collective behavior patterns associated with aging in these societies?
3. How does the spatially uneven distribution of aging relate to other sociodemographic characteristics in rural Romania and Bulgaria?
4. What are the most important policy challenges induced by aging?

Our research includes a macro as well as micro perspective. We employed macro-level statistical analysis of aging trends from Eurostat, the Council of Europe and other EU sources as well as data from national statistical institutes in Romania and Bulgaria. We also conducted media content analysis, community case studies (four villages in Romania and Bulgaria) and key informant interviews in those two Eastern European countries, following the mixed method approach.

The results of this study - highlighting the causes and some consequences of the rapid aging process in Romania and Bulgaria - prove that there is a need for coherent policies regarding the elderly in these countries, especially regarding aging in rural areas. The

traditional type of family - with children taking care of their old parents - is no longer dominant here, as many of the children leaving the countryside and, in many cases, the country as well. How is going to take care of the elderly in these countries, while their children take care of the old people in Italy or Spain? Many Eastern European governments - although in considerably better shape nowadays than 15 years ago - do not seem to have answers to this challenge although there is substantial media hype about aging especially in the context of falling birthrates. The discourse is usually at the national level, and due to the weak constituency rural problems are often overlooked. Our research helps national and local policy makers to address these challenges and at the same time it contributes to the country specific detailed analysis of the aging European periphery in the context of social cohesion as a fundamentally important European goal.

Selected references

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