Studying the Processes of Exclusion and Inclusion in Rural Bulgaria: The Significance of Kinship and Social Networks

Dissertation

zur Erlangung des
Doktorgrades der Philosophie (Dr. phil.)

vorgelegt

der Philosophischen Fakultät I

Sozialwissenschaften und historische Kulturwissenschaften

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Tag der Verteidigung: 28.11.2011

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Zusammenfassung

„Prozesse von Exklusion und Inklusion im ländlichen Bulgarien: Die Bedeutung von Verwandtschaft und sozialen Netzwerken“

In meiner Arbeit untersuche ich Prozesse von Inklusion und Exklusion als multidimensionale Phänomene mit einhergehenden sozialen, politischen, ökonomischen und kulturellen Auswirkungen in einem bulgarischen Dorf nach 15 Jahren des ‚Übergangs'. Meine Feldforschung habe ich in einem Dorf (Cherven) in den Jahren 2004 und 2005 durchgeführt. Im Anschluss gab es mehrere Folgeaufenthalte Vorort, um weitere Daten zu erheben und Material in regionalen Bibliotheken und lokalen Archiven zu untersuchen.

Viele der in der Arbeit beschriebenen Problemfelder beruhen auf Praktiken und Diskursen in Haushalten. Gegenwärtig bilden ländliche Haushalte die elementaren sozialen Einheiten im Dorf und vereinen die grundlegenden Funktionen der Existenzsicherung in sich – Produktion, Distribution und Konsumtion. Die Untersuchung von sozialen und Verwandtschaftsnetzwerken zwischen den dörflichen Haushalten geben Einblicke, wie die Dorfbewohner ihre soziale Umgebung strukturieren, und wie sie auf die Herausforderungen durch Armut und soziale Isolation reagieren. Bei der Untersuchung der Bedeutung von Verwandtschaftsbeziehungen in der ländlichen Gemeinde gehe ich besonders auf Familien- und Heiratsbeziehungen innerhalb des Haushaltes ein. Der Haushalt ist gleichzeitig meine primäre Untersuchungseinheit im Dorf. So verfolgte ich anhand eines Zufallssamples von privaten Haushalten in Cherven die alltäglichen Praktiken über einen langen Zeitraum. Meine Feldforschung stützt sich vor allem auf die Aufzeichnung von persönlichen Erzählungen und Gesprächen, vereinzelt ergänzt durch strukturierte und teilstrukturierte Interviews.

Kapitel Eins beschreibt die ideologischen Verschiebungen im Zusammenhang mit den Problemen von Inklusion und Exklusion sowie den allgemeinen sozialen und

politischen Kontext meiner Forschung. In diesem Kapitel stelle ich meinen Feldforschungsort detaillierter vor und gehe auf die von mir genutzten Methoden ein. Kapitel Zwei ist dem theoretischen Rahmen gewidmet. Ich gehe hier auf die Relevanz von Konzepten und Theorien zu *sozialen und Verwandtschaftsnetzwerken und sozialem Kapital* für mein zentrales Forschungsthema *Inklusion/Exklusion* ein. Mein Ziel ist es deutlich zu machen, welche Bedeutung Netzwerke und soziales Kapital für Prozesse von Inklusion und Exklusion haben, und damit einen Beitrag zu den damit verbundenen Debatten zu leisten.

Mein theoretischer Schwerpunkt liegt auf *Netzwerken* und *sozialem Kapital* als zwei zusammenhängende Konzepte in der aktuellen ethnologischen Forschung. In meiner Arbeit verwende ich den Begriff des sozialen Kapitals im Sinne Bourdieus und untersuche seine Bedeutung für Inklusions- und Exklusionsprozesse in der lokalen Gemeinde. Anhand der Netzwerke und des sozialen Kapitals, welche sie verkörpern, erforsche ich die laufenden sozialen, institutionellen, ökonomischen, politischen und kulturellen Transformationen. Meine Forschungsergebnisse aus dem Dorf veranlassen mich zu argumentieren, dass Netzwerke und damit verbundene Formen von Kapital starke Instrumente für Inklusion/Exklusion in der bulgarischen Gesellschaft sind. Das Netzwerkkonzept wird von mir als analytisches Werkzeug und Ansatz zur Untersuchung sozialer Beziehungen genutzt, ohne dass ich mich jedoch streng dem methodischen Instrumentarium sozialer Netzwerkanalyse anschließe. Die Prämissen des Konzepts nach Boissevain, Interaktion und Fluidität, sind für mich weitgehend gültig. Auch Mitchells Betonung auf Kommunikation und Instrumentalität von sozialem Handeln ist nützlich für die vorliegende Forschung, da beide Merkmale soziale Netzwerke inklusive und exklusive Praktiken und Diskurse in der Gesellschaft erzeugen können.

Für die vorliegende Arbeit sind sowohl die französische als auch die angelsächsische Forschungstradition von Bedeutung. Beide Ansätze entsprechen jeweils unterschiedlichen sozialen und politischen Doktrinen; diese Unterscheidung bildet einen zentralen Punkt der vorliegenden Analyse und bestimmt grundlegend die Dichotomie zwischen Gemeinschaft (kollektive/ gemeinschaftsbezogene Ideologien, z.B. Kommunismus) und Individuum (Ideologien mit Schwerpunkt auf dem Individuum, individuellen Rechten, z.B. Neoliberalismus) um die die Forschung zentriert ist.

Kapitel Drei beschreibt die Auflösung des sozialistischen Systems der genossenschaftlichen Landwirtschaft und deren zugehörigen Industriezweigen als eine natürliche Folge des Wegfalls staatlicher Unterstützung für die Landwirtschaft. Die Wiederherstellung der Eigentumsrechte individueller Landbesitzer leitete den Beginn privater Landwirtschaft ein und brachte neue Formen von Landkollektivierung mit sich. Der Erfolg einzelner Landwirte stützt sich nun auf ihre Fähigkeiten, Motivation, Initiative, Marktkenntnisse und ihr Talent, Kontakte zu nutzen und zu pflegen (soziales und kulturelles Kapital). Die Liberalisierung des Marktes hatte in den Augen der einzelnen Landwirte Unsicherheit und hohe Risiken zur Folge. EU Subventionen werden bevorzugt an landwirtschaftliche Großbetriebe vergeben, während Kleinbauern nur wenig Unterstützung erhalten. Die hauseigene Produktion – Subsistenzwirtschaft und teils marktorientierte Produktion – ist immer noch eine Strategie von Familien sich zusätzliches Einkommen und Lebensmittel zu beschaffen. Verwandtschaftsnetzwerke erfüllen dabei eine Doppelrolle - produktiv und redistributiv. Produktionsnetzwerke befinden sich normalerweise im ländlichen Gebiet, von der Redistribution profitieren meist Verwandte in urbanen Gebieten wie Kinder oder Enkel.

Kapitel Vier stellt die Entwicklung von ländlichem Tourismus in der Region vor und den jeweiligen Erfolg, den einige wenige unternehmerische Familien in dem Dorf mit tourismusbezogenen Geschäften erreicht haben. Tourismus hat sich in den ländlichen Gebieten neuerdings zu einer praktikablen wirtschaftlichen Alternative zur Landwirtschaft entwickelt. Der Ausbau der Infrastruktur und damit verbundener Dienstleistungen wird durch EU-Programme für regionale Entwicklung gefördert (soziale Integrationsprogramme). Am Beispiel einiger dörflicher Familienunternehmen im Bereich Hotel und Gastronomie wird gezeigt, dass soziale Inklusion ein Erfolg der Familie oder Verwandtschaftsgruppe ist, die soziales Kapital erfolgreich in ökonomische Ressourcen umzuwandeln versteht. Familienbeziehungen bilden die Grundlage für das Familienunternehmen und sind damit auch von zentraler Bedeutung in Bezug auf den Zugang zu Ressourcen (z.B. Arbeitskraft) sowie bei der sozialen Absicherung von Familienmitgliedern. Während marktorientierte kleinbäuerliche Landwirtschaft keine ausreichenden Einnahmen generiert hat, wurde ländlicher Tourismus zu einer Option der ökonomischen Diversifikation in den Dörfern. Mit Blick auf die Familienunternehmen werden außerdem folgende Aspekte untersucht: soziale

Absicherung, Geschlechterbeziehungen, die Funktion von kulturellem und sozialem Kapital, Auswirkungen auf soziale Ungleichheit und Klassenbildung.

Kapitel Fünf geht anhand von zwei wichtigen Gemeindeeinrichtungen – der Dorfschule und dem Kulturhaus (Tschitalischte) – auf Veränderungen in der Gemeinde ein. Beide Institutionen sind repräsentativ dafür, wie sich die Dorfgemeinde infolge des Ideologiewechsels vom Sozialismus zum Neoliberalismus verändert hat. Im Kulturhaus wurde zur Zeit des Sozialismus die soziale Inklusion der Dorfbewohner erreicht, indem Massenveranstaltungen zu Feiertagen, Festen oder Aufführungen stattfanden, die den Bewohnern ein Gefühl von Egalität vermittelten. Der öffentliche und allgemein zugängliche Ort 'Kulturhaus' definierte soziale Inklusion im Rahmen der Gemeinschaft, d.h. jedes Individuum in der Gemeinschaft konnte durch die Veranstaltungen im Kulturhaus soziale Inklusion erreichen. Der Wegfall des Kulturhauses ist ein Beispiel dafür, wie der postsozialistische Staat populistischen Kulturformen seine Unterstützung entzog, was zur Fragmentierung der Gemeinschaft, dem Verlust von Gleichheit und kultureller Marginalisierung führte (soziale Exklusion). Die Dorfschule bietet hingegen ein alternatives Modell von sozialer Inklusion mit der Implementierung von Computerkursen für die Kinder im Dorf. Dieses Schulprojekt reflektiert auch die neuen ökonomischen Prioritäten der globalen Informationsgesellschaft. Es kann zudem als intendierte Inklusion gesehen werden, welche die Lücke zwischen ländlichen und urbanen Gebieten schließt. Zugang zu guter Bildung als Form von kulturellem Kapital kann einer der wichtigsten Aspekte für Klassenbildung sein und kann ausschlaggebend für den ökonomischen Erfolg von Individuen und Gemeinden sein.

Kapitel Sechs ist Aspekten von sozialer Absicherung gewidmet, besonders in Verbindung mit Familien- und Verwandtschaftsnetzwerken. Soziale Absicherung betrachte ich als eine Komponente von sozialer Inklusion. In den postsozialistischen Staaten konnten die sinkenden Sozialleistungen (Renten, Mutterschaftsgeld, Arbeitslosengeld) nicht das Niveau der sozialen Absicherung während des Sozialismus erreichen. Der Wegfall von Gruppenprivilegien (Anspruch auf soziale Rundum-Absicherung durch den Staat) bedeutete auch den Wegfall von sozialer Inklusion durch Gruppenzugehörigkeit. Sozialistische Formen von Inklusion waren zum Teil paternalistisch: man erfüllt seine Pflichten gegenüber dem Staat durch Arbeit und der Staat wird für einen sorgen, z.B. in Bezug auf Gesundheitswesen, Bildung, etc. Im

Gegensatz zum Sozialismus, der für einen standardisierten, staatlich geförderten Lebensstandard für alle Bürger sorgte, ist die staatliche soziale Unterstützung gegenwärtig auf bestimmte Gruppen der sozial Exkludierten beschränkt. Als Folge entwickelten sich andere Absicherungsmechanismen, um die Lücken der staatlichen sozialen Absicherung zu schließen. In Cherven stützen sich diese Mechanismen hauptsächlich auf Familien- und Verwandtschaftsnetzwerke. Ein konkretes Beispiel ist der Wiederaufbau eines Hauses, welches die Bedeutung von Erbschaft als einen Bestandteil der Absicherung von Generation zu Generation verdeutlicht. Den Kontrast bilden zwei Lebensgeschichten, die illustrieren wie fehlende familiäre Solidarität und fragmentierte Verwandtschaftsbeziehungen zu Unsicherheit und sozialer Exklusion beitragen. Das zentrale Thema des Kapitels ist die Rolle von Familien- und Verwandtschaftsnetzwerken bei der sozialen Absicherung von Individuen und der Familiengruppe. Dies wird anhand konkreter Beispiele aus der Feldforschung belegt, u.a. anhand der Versorgung der Eltern oder der Unterstützung für Familienmitglieder in schwierigen Lebenssituationen.

Kapitel Sieben beschreibt die politischen Aktivitäten, die in Cherven im Rahmen der Parlamentswahlen vom Juni 2005 stattgefunden haben. Ich untersuche detaillierter Fälle von politischen Affiliationen und Netzwerken um zu illustrieren, wie soziales Kapital, das aus Familienbeziehungen generiert wird, in ökonomisches und politisches Kapital umgesetzt werden kann. Die Kapitaltransformationen innerhalb von Verwandtschafts- und sozialen Netzwerken werden genau nachgezeichnet, aber auch Aspekte der Elitebildung und Kontinuität vom Sozialismus zur Gegenwart werden erforscht. Ich verweise auf Probleme sozialer Ungleichheit und setze das Hauptthema von Inklusions- und Exklusionsprozessen in Beziehung zu staatlicher Politik und lokalen politischen Repräsentationen.

Zusammenfassend lässt sich festhalten, dass die Ergebnisse der vorliegenden Arbeit, die sich der Frage widmet, wie ländliche bulgarische Haushalte mit Problemen, die durch unerwartete Verarmungsprozesse nach dem Ende des Sozialismus entstanden sind, deutlich darauf verweisen, dass die Dorfbewohner in der Lage sind, sich an etablierte Praktiken anzupassen, um Formen sozialer Exklusion zu vermeiden. Dies geht einher mit einem intensivierten Vertrauen in soziale Netzwerke - vor allem in Verwandtschaftsbeziehungen, die ihnen den Zugang zu einer breiteren Auswahl an

Ressourcen ermöglicht. Wie bereits zu früheren Zeiten kompensieren urban-ländliche Verwandtschaftsnetzwerke zum großen Teil die unzureichende staatliche Unterstützung, was sich insbesondere im Bereich der Versorgung mit Leistungen zur sozialen Absicherung bemerkbar macht. Darüber hinaus zeigen meine Forschungsergebnisse, dass diese Art der Netzwerke ökonomische Diversifikation begünstigen kann, insbesondere im Zusammenhang mit der Einführung und des Ausbaus des ländlichen Tourismus und damit einhergehender kapitalistischer Formen der Produktion und des Konsums. Auf theoretischer Ebene habe ich mich der Problematik der Inklusion und Exklusion durch die Zusammenführung des Konzepts von sozialem Kapital mit dem Ansatz der Netzwerkanalyse angenähert. Diese Herangehensweise hat sich als aufschlussreich und fruchtbar für die Untersuchung der gegenwärtigen ländlichen Gesellschaft in Bulgarien herausgestellt und leistet somit einen Beitrag zum Studium postsozialistischer Gesellschaften sowie anthropologischer Studien über ‚Transition' im Allgemeinen.

Chapter 1

INTRODUCTON TO THE RESEARCH ON PROCESSES OF INCLUSION AND EXCLSUION IN A CONTEMPORARY BULGARIAN VILLAGE

Central Questions of the Research

Since the fall of the communist regime in Bulgaria in 1989 many Bulgarians experienced the negative consequences of liberalization and decentralization policies introduced to transform Bulgaria into a "democratic" and "market-oriented" country. The reform process was complicated and sometimes appeared to be chaotic. People felt there was nothing stable and durable in their present reality any more. Their sentiments of survival and insecurity reflected the ambiguous "transition" characteristic of all postsocialist societies in central and eastern Europe.

This thesis focuses on the processes of inclusion and exclusion understood as a multidimensional phenomenon with related social, political, economic and cultural implications. In my research I look at this problem in the context of a village called Cherven in Bulgaria. The fieldwork was done in the period 2004/2005, and since then I have made several followed up visits for collecting additional data and doing archival research in regional libraries and local archives.

Various aspects of inclusion and exclusion have accompanied the social change in the postsocialist Europe. Consequently these transformations have become an object of serious investigation (Anderson (ed.) 1995; Kideckel (ed.) 1995; Burawoy & Verdery (eds.) 1999). Many researchers have addressed the social change including land reform (Abrahams (ed.) 1996), political economy and market restructuring (Pickles & Smith (eds.) 1998; Lavigne 1999; Rainnie, Smith & Swain (eds.) 2002; Mandel & Humphrey (eds.) 2002; Bandelj 2008), ideology and the state (De Soto & Anderson (eds.) 1993; Hann (ed.) 2002), poverty and ethnicity (Hutton (ed.) 2000; Emigh & Szelenyi 2001), local practices and strategies (Pine (ed.) 2007; Bridger & Pine (eds.) 1998), and network restructuring (Grabher & Stark (eds.) 1997).

The corresponding economic and financial reforms in Bulgaria centred on the restitution of property rights (Cellarius 2003), privatization of industries and liberalization of prices and

markets (Begg & Pickles 1998; Dimitrov 2001), land decollectivisation (Ivanova 1995; Creed 1995; Kaneff 1995, 1996 & 1998; Meuers & Begg 1998). Related studies on Bulgarian postsocialist transformations demonstrate how these structural reforms have transformed public policies, local economies and everyday practices and discourses (Ivanova 1997; Creed 1999 & 1998; Kaneff 2002a; Giordano (ed.) 2000; Giordano & Kostova 2002; Cellarius 2004).

The neoliberal reforms created new problems as much as opened new opportunities. For example, in the labour market greater labour mobility was caused by unemployment and poverty. It was a coping strategy people had to develop in order to adapt to the changing reality. Very often the new modes of adaptation challenged their habitual lifestyles and modes of thinking. Consequently some people managed to accommodate to a degree, but others were not that successful (Konstantinov 1999; Mitev at al. 2001; Kaneff 2002b; Giordano & Kostova 2004; Angelidou 2008).

Considering this background information I would like to further contribute to this body of literature by addressing the following questions in my research: "What factors determine the successful integration of Bulgarians into the developing market society? Who is in a better position to benefit from the new opportunities offered by globalization, open market economy, liberalization of industries, etc.? How do people cope with problems related to social security and manage to protect their families from the negative effects of unemployment, poor health, and old age?"

In this context the main purpose of my research is to uncover the means of inclusion/exclusion in one Bulgarian village after almost fifteen years of "transition".[1] I approach the complicated dichotomy of "inclusion/exclusion" by looking at the interplay between structure and agency and describe the mechanisms by which they shape the processes of current development in the Bulgarian countryside. My theoretical emphasis is on *networks* and *social capital* as two interrelated concepts in contemporary anthropological research. In the thesis I reflect on social capital in the meaning suggested by P. Bourdieu (1980, 1986/1983) for political, cultural and economic capital, in assessing their significance for inclusion/exclusion in the local community.[2] By looking at networks and the forms of social capital they epitomize I examine the social, institutional, economic, political and cultural transformations taking place in the village. These transformations of

[1] I have started my fieldwork in October 2004 and finished it the same month the following year.
[2] In Chapter 2 I explain in more detail the central theoretical concepts of the research.

community are accompanied by related processes of inclusion and exclusion, thus creating new groups of privileged and socially disadvantaged in the rural society.

My aim is to highlight the significance of social networks and social capital in these current developments. Based on my research in the village, I argue that social networks and related forms of capital are powerful instruments of inclusion/exclusion in the Bulgarian society. While it's not a new issue for Bulgaria, only recently attempts were made to take it into account and construct it as an object of academic research and debate. The great significance of social networks was reflected in the processes of distribution and exchange during socialism and after the fall of the socialist state (Rajchev & Stojchev 2004). Therefore there is a marked continuity in the ways the postsocialist Bulgarian society is restructured through networks to accommodate the interests of different actors and social groups. In this line I examine network restructuring in one village and then try to evaluate what might be the long-term effects on the general rural development.

The concepts of social networks and social capital are particularly applicable to my research on social exclusion since they provide the conceptual framework linking two periods in the modern Bulgarian history: socialism and postsocialism. Theoretically the socialist Bulgarian society is described as a society of mutating social networks (Rajchev 2003; Deyanov 2003; Tchalakov 2003; Bundzhulov 2003; Rajchev & Stojchev 2004) originating and transforming due to the peculiarities of the socialist economy characterised as the economy of shortage (Kornai 1980, 1986, 2000). The significance of restructuring networks and social capital in the context of postsocialist societies of eastern Europe and Russia has been adequately explored in the relevant literature (Wallace 1997; Stark & Bruszt 1998; Ledeneva 1998; Brunnbauer & Kaser (eds.) 2001; Torsello 2003; Torsello & Pappova (eds.) 2003; Badescu & Uslander (eds.) 2003; Roth (ed.) 2007 & 2008).

How does the notion of social capital differ in the two periods? According to Szelenyi (1998) social capital during socialism rested on and resulted from the administrative and political hierarchical structures of the party-state. After socialism, this type of social capital was replaced in significance by the cultural capital of educated pro-Western professionals. It is cultural capital (in the form of educational credentials), according to his view, that would determine the success or failure of individuals in the neoliberal economy. In other words, aspects of cultural capital could be influencing the processes of inclusion and exclusion in the context of postsocialist societies.

The significance of cultural capital in Bulgaria is explored by Kirsten Ghodsee (2005) who writes about the Bulgarian tourist industry during and after socialism. Exploring the gender perspective in the tourist market, she demonstrates how the cultural capital of women working in tourism has been re-valued after the changes. This cultural capital in the form of knowledge about Western cultures, speaking foreign languages, etc. has been decisive in the successful re-integration and promotion of qualified women in the workplace. Therefore Ghodsee as much as Szelenyi (1998) in *Making Capitalism without Capitalists* underlines the importance of cultural capital in the process of social adaptation during the uneasy economic restructuring.

My experience in the village has suggested the themes and issues I should discuss in relation to my main theoretical concerns. Thus I direct my attention at investigating current rural developments in several spheres – farming, rural tourism, institutional transformations, social security, and political leadership. Each of the five core chapters of the thesis is constituted around one of these fields. I should acknowledge that exploring such a variety of issues is a rather difficult task to accomplish in one doctoral research. Yet I prefer representing the village as a multidimensional and dynamic social environment rather than concentrating on only one or two of these aspects. I, nonetheless, recognise the deficiencies this approach of representation might have in terms of the thoroughness, comprehensiveness and consistency of the collected and conceptualized ethnographic data.

"Social Inclusion" during Socialism

In this section I provide some background information about the socialist system and its ideological attitude towards the problems of poverty and social exclusion. In doing so, I try to clarify how the official treatment of these social problems has been modified following the change in the ideological regimes in Bulgaria – communism and neoliberalism.

Poverty and social exclusion were not part of the official discourse during socialism in Bulgaria and in many other countries of the former socialist block. Ideologically, social problems were seen as an integral part of the capitalist system and their existence in the former communist states was denied and not given enough consideration (Redmond & Hutton 2000: 7-8). The totalitarian state strove to reduce individual differences and convert individuals into socialist masses through special policies cultivating specific consumer tastes and preferences, while at the same time the socialist ideology dictated what the basic

necessities were and how to satisfy them (Mineva 2003). In most of the cases the socialist state persecuted distinctive practices and discourses (Bundzhulov 1995:75; Verdery 1996).

Nevertheless there were officially and unofficially acknowledged ideological and status distinctions among the various groups in the socialist society – party elites, workers, farmers, minority groups, etc. All these distinctions were permitted to exist often in contradiction to the proclaimed social egalitarianism. In the socialist state there was a system of official privileges: special privileges granted to the party and state elites, privileged treatment of professional guilds, regions and industries, and mass privileges for all such as education and health care (Kornai 2000).

The mass privileges guaranteed the "basic necessities of life" for all and they also had equalizing effects. Rajchev and Stojchev (2004) estimate the Bulgarian "middle class" in this period to be around 80%.[3] The levels of consumption and living standards characteristic of this "middle class" detailed by Rajchev and Stojchev (ibid: 62) point to a homogenised and egalitarian social status:

a. all-inclusive free primary education;
b. all-accessible secondary education;
c. guaranteed level of free health service, including dental service;
d. full employment guaranteed by the state;
e. high security provision for mothers and children; clothes, shoes and food for children at low costs;
f. low cost transportation leading to great mobility;
g. 90% of population held property (e.g. apartments, houses);
h. high levels of culture-related consumption;
i. all-accessible recreation and sport facilities;
j. high government spending directed at encouraging the social integration of minority populations;

The middle class Bulgarian citizen under socialism was used to taking for granted this living standard sponsored by the state and regarded equality as an essential and natural feature of the social reality (ibid: 63). The welfare policies of the socialist regimes were driven by ideological considerations: emancipation of women, full employment and low

[3] Rajchev and Stojchev (2004: 61) admit that 'middle class' is a tentative term under socialism.

wage inequality **(**Redmond & Hutton 2000: 4-7). In the socialist social security system people were grouped according to their specific needs: young families, minority groups, workers, farmers, etc. In contrast to the bourgeois state which protects the social rights of autonomous individuals, the socialist state deliberately ensures group rights/privileges pertaining to regions, industries, economic sectors, social layers (Nikolova & Georgieva 2003: 219-220). Therefore, during socialism the social rights were presumed to be collective (group) rights accentuating community solidarity in opposition to individual rights which were mostly associated with the main ideological opponent – the capitalist bourgeois state (Znepolski 2008: 89).[4] Therefore the socialist social security system was ideologically opposed to the classical liberalism and its focus on the individual and private property (that is ownership rights, presumed to be individualistic).

The privileged treatment of one group over another resulted in masked social inequalities breaking up the homogenized social structure (Nikolova & Georgieva 2003: 225). At the same time the lack of recognition for the individualizing aspects of personality (e.g. consumer preferences and self-identifications of any kind: religious, gender-related, ethnic, political, class-related, etc.) became a source of frequent discontent during socialism as some people felt they could not personally benefit from their own efforts, skills and talents. Individual careers and access to privileges depended to a great extent on connections to Party elites or political membership in the Communist Party. Preferential treatment was associated with having a proper family background supporting the ideologically correct versions of the historical past (Kaneff 2004). In this way the average socialist citizens had grown to believe that the state should accommodate their social security needs and there was little they could do to change their life circumstances.

The end of the socialist era signified the dismantling of the "safety net" of social security provisions (Leonard & Kaneff 2002) and led to a dramatic reduction in personal expenditure and consumption for a majority of Bulgarians. In the light of the withdrawal of the state and emerging social inequalities, dispositions inherited from socialism remained prevalent among large segments of population. Still many rural people feel nostalgic about the socialist times, when the paternalist state was well providing the living standard of the average socialist citizen. Nevertheless in the thesis I point to some examples of enterprising families in the village who are willing to take responsibility for their own future, despite

[4] This distinction is well reflected in the two approaches to social exclusion – the French and the Anglo-Saxon, and the relevant political doctrines they originate from – traditional conservatism vs. classical liberalism. In Chapter 2 I discuss these approaches in greater detail.

nostalgia for socialism and disappointment with the present Bulgarian state. Consequently, they became the first agents of economic and social change in Cherven, stimulating the local economy and transforming the community profile, now largely associated with recreational tourism.

Social Policy Approaches to Exclusion in Postsocialist Bulgaria

The official denial of problems associated with poverty and social exclusion resulted in inadequate social policies in the postsocialist period, affecting all former socialist states (Mitev at al. 2001; Redmond & Hutton 2000). In this section I need to consider the following questions: "How do the policies of the postsocialist state influence the inclusive strategies of individuals, family groups and local village communities? What is the current regional and local impact of the state policies aimed at facilitating the social integration of marginal populations?" I consider these questions important for my analysis because I want to illustrate how structure influences agency in the process of social inclusion. Therefore I could not completely demonstrate and explain the inclusive practices and discourses of rural inhabitants without relating them to the structural constraints of corresponding state policies.

Bulgaria is now a member of the EU (since January 2007) and government policies of social integration correspond to relevant programs and projects funded by the EU. For that reason I need to look at how social exclusion is defined in the EU papers and analogous programs of the Bulgarian government.

In the EU official papers dedicated to social exclusion the term is defined in the following way: "The term social exclusion can be described as comprehensive, multidimensional and dynamic; it generally refers to limited chances for individual participation, economically, socially, culturally as well as politically, and addresses the issues of reinforcing processes of accumulated disadvantages and the weakening of social rights (Barnes et al, 2002; Sen, 2000; Littlewood, 1999; Abrahamson, 1998; Kronauer, 1998; Room, 1998; 1995; Silver, 1994)."[5] According to this definition social exclusion is related to *social rights* and *individual participation* and therefore one major concern of social policies directed by the EU is facilitating the social protection of people following in the categories of risk groups: unemployed, people with disabilities, etc.

[5] Bohnke, P. 2004 *Perceptions of social integration and exclusion in an enlarged Europe*, European Foundation for the Improvement of Living and Working Conditions: www.eurofound.eu.int/qual_life, p.2

The concept of social exclusion was debated in academia during 1960s and 1970s but did not become incorporated in the EU policy structure until the late 1980s.[6] Since the beginning of the 1990s social exclusion was linked to poverty and was monitored by the Laeken indicators measuring the various types of household incomes.[7]

Initially the EU understanding of social exclusion was influenced by the Anglo-Saxon research tradition emphasizing relative deprivation and access to resources[8]:

> "Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the type of diet, participation in the activities and to have the living conditions and the amenities which are customary, or at least widely encouraged or approved in the societies to which they belong. Their resources are so seriously below those commanded by the average family that they are in effect excluded from the ordinary living patterns, customs, and activities" (Townsend 1979: 31).

Later on the emphasis on social participation was incorporated to complement the existing theories on social exclusion.[9] Consequently the EU policies of social inclusion were devised to facilitate access to resources along with social participation, thus mixing elements of both research traditions –the Anglo-Saxon and the French.[10]

In a policy report on poverty and social exclusion in the rural areas of the European Union, the specific problems of the rural areas in Bulgaria were identified as follows[11]:

- Demographic decline: low birth rate, negative natural increase, higher mortality rate, depopulation especially due to out-migration by the young people caused by lack of employment, low population density;
- In the labour market: low educational status, higher rates of unemployment and long-term unemployment;
- Spatial dimension of poverty is exacerbated by a poor and deteriorating infrastructure;

[6] Ibid;
[7] About details on the Laeken indicators, see Appendix 1.
[8] Ibid;
[9] Ibid (2; 42-44);
[10] I discuss the concept of *social exclusion* in the context of these approaches in Chapter 2.
[11] Abadjieva, Lilia *Poverty and social exclusion in rural areas – Final Report Annex I – Country Studies: Bulgaria*, European Communities, 2008 published on the website of the European Commission: http://ec.europa.eu/employment_social/spsi/docs/social_inclusion/2008/rural_poverty_annex_bg_en.pdf, p.7

- Significant fragmentation of land's ownership;
- Rural welfare has been constrained by low levels of income, driven by low wages in rural areas, high unemployment, and low levels of agricultural productivity;
- Limited access to basic services – water, sanitary, health, etc.

This generalized background provides important insights into the problematic issues concerning exclusion and inclusion in rural context. Undoubtedly many of the listed problems existed in the village where I did my field work - aging population, low incomes, limited access to modern facilities and services. Against this background my research aims to reveal the mechanisms by which local actors cope with situations of social exclusion in a period of great uncertainty and limited personal and state resources.

When Bulgaria was a candidate country aspiring to full membership status in the EU, the Bulgarian Ministry of Labour and Social Policy (MLSP) devised plans to combat social exclusion in cooperation with the European Commission.[12] The prioritized areas of the Bulgarian social policy as outlined in a joint memorandum for 2005 were[13]:

1. Developing the **labour market** to facilitate social inclusion and stimulating employment as a basic social right of all citizens
2. Improving the quality of **education**
3. Resolving the problems of **accommodation for low income households**
4. Guaranteeing equal access to high-quality **healthcare**
5. Making accessible the **social protection**
6. Improving **social services**
7. Making **transportation** equally accessible for every citizen
8. Stimulating development of **problematic regions**
9. Facilitating the social and educational integration of the **vulnerable ethnic minorities**

The Bulgarian authorities incorporated the EU definition and approaches to social exclusion in addressing the specific problems of the Bulgarian society: unemployment, low quality education, poor accommodation for low income households, and marginalisation of risk groups: children, pensioners, and people with disabilities, mentally sick people, and ethnic

[12] Съвместен меморандум по социално включване 'Република България' (2005) в сайта на Министерство на труда и социалната политика (Joint memorandum on social inclusion 'Republic of Bulgaria' (2005) on the website of the Ministry of Labour and Social Policy): http://www.mlsp.government.bg/bg/docs/index.htm
[13] Ibid, pp.21-25, my emphasis

minorities. As seen from the list above a major concern of the Bulgarian social policies was improving the infrastructure and the system of transportation across the country. In addition special attention is given to the development of regions with high unemployment rates, high mortality rates and low life expectancy rates. These are the regions of the northwest Bulgaria that had experienced the most negative effects of economic restructuring – closing of industries and resulting massive unemployment and out-migration.[14] The balanced regional development is the priority of the Bulgarian Ministry of Regional Development and Public Works. This Ministry participates in a number of European programs for regional development.[15]

The references to these official documents presented so far make obvious what the emphasis in contemporary government policies on social exclusion is – that is facilitating the social integration and social protection of the risk groups. Therefore one important difference with the social policies of socialism I notice in the definition and scale of social assistance. As I demonstrated in a previous section**,** during socialism the state sponsored the basic living standard for all socialist citizens in correspondence to the *official egalitarianism.* Therefore the semblance of equality was maintained often in ideological opposition to the Western capitalism distinguished by inherent social inequalities and injustices. Problems of social exclusion were not considered in official public and academic discourses. Moreover the socialist state credited itself with improving the living and working conditions of all citizens and especially rural dwellers. In this context socialism was regarded as beneficial and contributing to social integration in comparison to the pre-socialist period (Znepolski 2008).

With the end of the socialist state, Bulgarians have experienced the deterioration of living standards. The dismantling of the welfare system of the socialist state marked the end of the group privileges as noted above (Kornai 2000; Rajchev & Stojchev 2004; Znepolski 2008). In postsocialism the average Bulgarian citizen could no longer retain the mass privileges (the homogenised social statuses) granted by the Bulgarian socialist state. The process of losing socialist statuses is described as *deklasatzia* (Rajchev & Stojchev 2004: 68) and that is the gradual decrease in the living standards that render a majority of people *déclassé.* Thus the term *deklasatzia,* used in the context of the Bulgarian society, implies a starting process of greater social stratification and social exclusion. In the context of these

[14] Ibid, p. 24
[15] Ministry of Regional Development and Public Works: http://www.mrrb.government.bg/index.php?lang=en

social transformations, the problematic of social in/equality, and social justice entered the public discourses on social exclusion in Bulgaria.

Ultimately, after the introduction of open market economy and neoliberalism, Bulgarians had lost the safety nets on which they used to rely. While the society was losing more and more of its egalitarian features, social differentiation produced new groups of socially excluded and marginalized citizens. Understandably, the social security programs are now directed at facilitating the social participation of these excluded groups. Consequently I argue that in contrast to socialism, the state social support is now restricted *to the defined groups of the needy* (or socially excluded) in an attempt to partially restore the social balance that had been irretrievably lost in the last years. The integration policies of the Bulgarian postsocialist state are concerned with the economic and social aspects of exclusion and focussed on priority groups at risk, thus reflecting the major features of the EU inclusion policies.

Taking into account the government policies towards social exclusion/inclusion in my research I pay attention to many of the aspects highlighted in the governmental plans. In particular I focus on the educational projects and cultural facilities available in the village in Chapter 5. In this chapter I describe the local school and the chitalishte as representative of the formal social capital available in the community.[16] Then I consider how the functioning of these institutions in historical perspective has contributed to the social and cultural integration of the rural population. The expansion of rural tourism as one strategy of local and regional development is described in Chapter 4. There I look at three enterprising families and their informal networks of friends and relatives. My emphasis is on local actors integrating their family business strategies into the framework of government policies as a way of dealing with local aspects of economic and social exclusions. The range of social services & social protection accessible by rural households is the theme of Chapter 6. I pay attention to social assistance granted to people with disabilities as one specific risk group and the specific grants distributed to low income households of pensioners to cover their heating expenses during the winter season.

Although I describe certain aspects of the government programs I could not engage with a satisfactory analysis of the efficiency of such programs at local level. Such analysis should be possible after an in-depth research on the social security needs of rural people –

[16] The concept of formal social capital I discuss in Chapter 2 - theoretical foundations of the research.

something I could not have accomplished in a single chapter of this thesis. State policies are not the object of my research anyhow. On the other hand I need to acknowledge their power in shaping individual and family strategies of inclusion and directing institutional transformations. In a way by making this acknowledgement, I reveal the structural factors that have impact on local actors and their choices of acting. Therefore in contrast to the MUD and SID discourses[17] on social exclusion that prioritize individuals and their behaviour I look not only at actors and their behaviour, (e.g. "the poor people"), but I reveal the interplay between structure and agency in resolving problems of social and economic integration of individuals and their families at local and regional levels.

A Brief Description of the Region and the Village

The Region of Plovdiv

According to Bulgarian administrative boundaries Cherven is situated in the district of Plovdiv which is part of the south central region with a total area of 22 365 sq. km or 20.1% of the total territory of Bulgaria. The Plovdiv district comprises of 215 settlements – 17 towns and 129 villages with total population of 715 904. [18] The district capital is Plovdiv with a population of 338 302 – the second-largest city in Bulgaria after the capital city Sofia. The unemployment coefficient in the district is 7.2 - lower than the country average of 10.1. The coefficient of employment is 42.9 compared to the country average of 44.7. The number of municipalities in the Plovdiv district is 18, including Assenovgrad municipality. Administratively Cherven is one of the 29 villages in Assenovgrad municipality.

The south central region (Yuzhen Tsentralen), where Cherven is located, is among the poorest regions in the European Union. The regional GDP per inhabitant, expressed in purchasing power standards, was 27% of the EU27 average in 2007.[19] According to the same survey the poorest region of the EU was also in Bulgaria – the south western part of the country with GDP of 26% of the EU27 average.

[17] The moral underclass debate (MUD) and the social integration discourse (SID) are two related discourses on social exclusion in Britain. I discuss them in more detail in Chapter 2 – the theoretical foundations of the research.
[18] Source: National Statistical Institute, *Census 2001:* http://www.nsi.bg/Census_e/Census_e.htm
[19] Source: EUROSTAT news release from February 18, 2010:
http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/1-18022010-AP/EN/1-18022010-AP-EN.PDF

Cherven[20]

Cherven is favourably located on the road connecting two important towns in southern Bulgaria - Plovdiv (the district capital) and Kyrdzhali. The village is only 10 km from the municipal centre of Assenovgrad. The main road passing through Cherven separates it into two nearly equal parts. The south western side of the village slips into the Rhodope Mountains while the north eastern side borders on the Thracian Valley. This location is suitable for growing a majority of agricultural products.[21]

According to historical sources a settlement existed for thousands of years in this area. The regulation of the famous Bachkovo monastery from 1083 testifies to the long existence of the village.[22] In this written source there is information about the property of the monastery together with a list of the settlements belonging to its region. One of the listed names is Cerven (the old name of Cherven). The name derives from the red clay in the lands of the village (the Bulgarian the word "червен" or "cherven" is translated as "red"). In the past the red clay was used as building material for bricks and roof tiles. From the very beginning Cherven was a Christian village. This feature has been confirmed by the Bulgarian names given to nearby locations such as *"babina poliyana"* (granny's meadow), *"Stoyanova cheshma"* (Stoyan's water spring), *"Tocheva cheshma"* (Tochev's water spring), *"Milyuva niva"* (Milyu's land plot), etc.

Initially the so called "old village" was situated 1 km in the west from the present location of Cherven. The plague of the 16th century drove the people away from their homes and pushed them into the mountain areas where they spent a few years. Upon returning, the remaining villagers decided to change the place of the village and thus avoid further contamination. Consequently the village was re-established in its present location with a population of around 300-400 people. In contrast now the village has around 802 permanent residents.[23] During the weekends and summer months the population swells to over 1000 due to the rising number of villa owners and relatives paying occasional visits.

The main source of making a living was agriculture and animal husbandry. Initially grain products dominated – wheat, corn, barley. Later tobacco cultivation began followed by the

[20] The source of the historical information about the village is the website of the Assenovgrad municipality: http://www.assenovgrad.com/objects.php?cid=112
[21] See the maps in Appendix 2.
[22] The Bachkovo monastery is one of the oldest and most renowned Bulgarian monasteries. From its inception in 1083 until this day the monastery has been a centre of religious activity and a major attraction for visitors.
[23] See the tables in Appendix 3.

expansion of viticulture in the period 1920 – 1930. The trade with grape and wine significantly increased the monetary incomes of village households. This financial prosperity was soon demonstrated through the raising number of family houses and business buildings. The vineyards in the village reached 5000 dekar in 1955. In the third chapter of the thesis I consider how the village profile has changed through the years with respect to agriculture, modes of farming, and crop cultivation. My emphasis on farming practices within the household economy in Chapter 3 reflects the general topic of the thesis – kinship and social networks and their impact on the processes of inclusion and exclusion.

After the demographic growth in the period 1926 – 1946, the population figure for the village reached 1 731. Meanwhile the administrative status of Cherven changed several times. Until 1970 the village ranked as a municipality including the following neighbouring villages: Dolnoslav, Gornoslav, Muldava, Oreshets, Dobrostan, and Mostovo. Then the total population of the Cherven municipality comprised 4 972 people. Nowadays the village is no longer a major administrative unit but is part of Assenovgrad municipality together with other 28 villages and the town of Assenovgrad. The total population of Assenovgrad municipality is 69 122.[24] Of this number 80% are residents of Assenovgrad (67 238 people) and the remaining 20% are village residents disproportionately divided among the twenty-nine villages.

From 1960 to 1970 the modern image of the village square was gradually completed. In these years, the building of the local culture house (the chitalishte) was finalised. Opposite to the culture house, stands the huge administrative building housing the office of the Mayor and other commercial enterprises. During the same period the local school was transferred to the new premises and the first kindergarten opened doors. Among other public facilities operating in the village were the veterinary station and the medical centre. In the chapter dealing with community transformation I examine the functions of two important public institutions – the local school and culture house. In Chapter 5 I try to estimate how these two sites had contributed to the changing profile of the village and how their existence has always been inextricably linked with the transformations taking place on national scale.

In 1878 the local church burnt down during a Turkish raid on the village. It was rebuilt in 1885 with donations from villagers. The church was named after the popular patron saint

[24] The population data is based on the last Census in 2001.

"St. Iliya". The remnants of the first village school still stand in the church yard. The church was most recently renovated in 2005 prior to the communal celebrations of its 120-year anniversary in July, 20 that took place the same year.

In the village and its surroundings there are 9 chapels. The large number of chapels is one of the unique features of the area. Assenovgrad has been popularly termed as "the little Jerusalem" due to the presence of many monasteries, churches and chapels in the area (Nikolova and Genov 2008). In the past years and definitely after the fall of communism these cultural monuments (four monasteries, thirty-three churches, and over 200 chapels) provided the basis for the developing religious and cultural tourism in the region.[25] Several tourist routes has been established around these popular sites and contributed to the diversification of the local economy – an advantageous regional development. In Chapter 4 of my thesis I discuss how this regional feature had impacted the economic strategies of a few enterprising families. I describe the story of the local entrepreneurs who decided to invest and expand the tourist facilities in the village as seen through the recent establishment of three family run hotels. The quick proliferation of tourist services and related facilities has had enormous consequences for the village economy and the transformation of the local community.

The residents of Cherven enjoy a good infrastructure connecting the village to the major administrative centres – Assenovgrad (10 km) and Plovdiv (28 km). The frequent and affordable transportation (buses in both directions pass through the village every hour) is the main reason why so many young people chose to remain in Cherven instead of migrating to urban areas as was the case with depopulated nearby villages. Daily commuting to urban areas is the prevailing economic strategy among the majority of hired workers and definitely helps offset the lack of employment opportunities in the village. The easy access to the village similarly benefits the local entrepreneurs who contribute to the development of rural tourism. In addition, acquiring property in the village has become rather expensive as houses with plots are priced around 30 000 BGN. The nearness of urban centres combined with magnificent nature had made Cherven an attractive site for the growing number of villa owners. Their presence in the village over the weekends and during summer months significantly contributes to the development of local economy of services. In this light it is not surprising to find three restaurants and two grocery shops in the village of a little more than 800 permanent residents.

[25] For additional information on the churches and monasteries, see the official site of Assenovgrad municipality at http://www.assenovgrad.com/object.php?id=97

In 2004/2005 there were three well functioning enterprises in the village: a parquet-producing factory, a shoe manufacture, and a wood processing workshop. There were gas and petrol stations. The total number of houses was 540. Most households had electricity, telephone line and cable TV. It was possible to have Internet connection in the village but only a few households had computers. Accessing water has been a major problem for households since the area is not naturally well provisioned with an adequate amount of water resources. Geographically the village is situated at the foot of the notoriously dry hill of Dobrostan composed of limestone rocks that absorb water supplies. In the recent years two water supplying systems were constructed that were less effective in case of drought. Occasionally during summer months the water pressure was low and water usage for household needs was regulated according to a temporary regime. The sewerage system in the village was still in a process of completion.[26]

Chapter Resume

In ***Chapter 3*** I demonstrate how the dismantling of the socialist system of farming cooperatives and related industries was a natural consequence of the end of state support in agriculture. The restitution of property rights to individual landowners signaled the beginning of private farming and introduced new forms of land collectivization. The prosperity of farmers now depends on their skills, motivation, initiative, knowledge of markets and ability to use and maintain connections (social and cultural capital). The liberalization of markets was followed by insecurity and high risks recognized by individual farmers. The EU subsidized projects favour big scale farming and offer limited support to small scale farmers. In this context household based production - subsistence and to some extent market oriented farming – persists as one strategy of providing families with additional income and food supplies. The role of kinship networks is double - productive and redistributive. Productive networks are usually based in the rural setting while the redistribution is often directed towards relatives residing in urban areas - usually the beneficiaries are children and grandchildren.

Chapter 4 is about the development of rural tourism in the region and the relative success of a few enterprising families in the village in establishing related enterprises. Rural tourism has recently become a viable economic alternative to farming in rural areas. In this context the development of infrastructure and related economy of services

[26] The data about the village in this paragraph is valid for the period of my field work – 2004/2005.

is supported by EU programs for regional development (social integration programs). In this respect I review the establishment of a number of family businesses in the village related to hotel/restaurant management. My argument in this chapter is related to the idea of social inclusion as an achievement of the family and kin group while social capital is successfully translated into economic resources. Therefore family relations as the basis of the family enterprise become central in providing access to desired resources (e.g. labour) and instrumental in providing social security for the members of the family group. While market oriented family farming has ceased to generate considerable profits, rural tourism became one option of economic diversification in villages. In reference to family business I look at aspects of social security, gender relations, functioning of cultural and social capital, implications for social inequality, and class formation.

Chapter 5 is about community transformation observed through two important community sites – the village school and the culture house (the chitalishte). These institutions represent the way the village community was transformed following the ideological shift from socialism to neoliberalism. First I focus on social inclusion realized through mass participation in community events in the culture house (e.g. holidays, celebrations, clubs and performances) which produced a feeling of equal standing among villagers during socialism. Then the public all-accessible space of the culture house defined social inclusion within the boundaries of community; in other words every individual belonging to the community could become socially included through the activities taking place in the chitalishte. The case of the culture house demonstrates how the postsocialist state has withdrawn its support for the populist forms of culture which provoked experiences of community fragmentation, loss of equality and cultural marginalization (social exclusion). In contrast the local school provides an alternative model of social inclusion through the implementation of computer training program for the village children. The school project – the introduction of IT training in the local school - is reflecting the new economic priorities of the global information society. It could be interpreted as a sign of inclusion, bridging the gap between rural and urban areas. Access to quality education (accumulation of cultural capital) could become one of the most salient features determining class formation and a crucial aspect of economic prosperity for individuals and communities.

Chapter 6 describes aspects of social security in reference to family and kinship networks. Social security I perceive as one component of social inclusion. The declining social provisions guaranteed by the postsocialist state (pensions, maternity benefits, unemployment compensations) could not match the level of social security provisions during socialism. The end of group privileges (all-inclusive entitlements to state provided social security) signaled the end of social inclusion defined by group membership. Socialist forms of inclusion were in part about paternalism: you fulfill your responsibilities to the state by working and the state will look after you in terms of healthcare, education, etc. In contrast to socialism when all citizens enjoyed homogenized state-sponsored living standard, the state social support is now restricted to the defined groups of the socially excluded. As a result other compensating mechanisms have evolved to fill in the gaps of the state-provided social security. In the village these mechanisms of security provision are essentially centered on kinship and family networks. In one specific example I review the case of a house reconstruction in order to underline the importance of property inheritance as one feature of security provision across generations. In contrast I refer to two life stories to illustrate how the lack of family solidarity and the fragmentation of kinship ties both contribute to experiences of insecurity and social exclusion. Therefore the underlying theme of the chapter is reflecting the role of kinship and family networks in ensuring the social security of individual and family group. Specific cases discussed in the chapter concern the care provided to elderly parents and the support to family members in life crisis situations.

In ***Chapter 7*** I analyze the political activity taking place in the village in the context of the last parliamentary elections from June 2005. More closely I inspect cases of political affiliation and networking to illustrate how the social capital generated by family relations could be transformed into economic and political capital. Thus I trace capital transformations taking place within kinship and social networks. I also explore issues related to elite formation and continuity from socialism to present day. I hint at problems of social inequality and in this sense relate the main theme, exclusion and inclusion, to the context of state politics and local political representation.

Methodology

Defining "Household"

In exploring the importance of kinship relations in the rural community, I focus on family and marriage relations within a household. Indeed, the household has become my unit of observation in the village. For methodological reasons I need to explain what I mean by "household". There is no straightforward definition of "household" in anthropology. It is generally acknowledged that household arrangements are culture-specific and yet there are substantial variations within a given culture. Nowadays the household arrangements in the village fluctuate: many are composed of couples of pensioners, or just solitary widowers. In addition there are multi-generational households which combine three or more generations of one family under one roof.[27]

Many of the problems discussed in the thesis are rooted in household practices and discourses. Presently rural households are fundamental social units in the village where they combine basic subsistence functions – production, distribution, consumption. Social networks among village households can provide valuable insight into the ways villagers structure their social world and respond to the challenges of poverty and social isolation. I need to highlight why the village is a very good setting for studying family relations and kinship networks. The close proximity of households is encouraging social contacts (in contrast to big cities) and existing networks in this spatially restricted area are easy to trace. Therefore the central problems that need to be studied in relation to social exclusion could be summarised as follows: What is the social significance of the existing social and kinship networks within the households in the village, including cases of interaction between relatives that take place in urban-rural context? What is the scope of these relations, what kind of exchange is taking place and how these contacts facilitate social integration?

I also had the unique chance to observe the state official approach to studying households as seen in the implementation of the Household Budget Survey (HBS) in the village for two consecutive years - 2004 and 2005. I consider some details concerning HBS relevant to my

[27] The traditional compound household (multi-family household) in the Balkans is known as *zadruga* (Todorova 1993). This traditional family arrangement was once closely connected to collective farming practices and land ownership in a period when land was the basic collective resource of subsistence. The *zadruga* was fundamental to the Bulgarian culture of *familism* for many centuries (Sanders 1949). *Familism* was gradually undermined by the advent of the capitalist economy and related forms of ownership and production in Bulgaria. The resulting impact on household composition and size I discuss in more detail in Chapter 3 in relation to land collectivization in the framework of the socialist reformation in Bulgaria after 1944.

research on social exclusion - the survey provides the official data on which government anti-poverty programs are based. I acknowledge the importance of this survey in designing relevant social policies.[28]

Hence in the period 2004/2005 I observed the work of the regional statistical office in Plovdiv (a subdivision of the National Statistical Institute) in conducting the Household Budget Survey in Cherven. Upon my coming to the village I contacted the representative of the survey and accompanied her during her regular visits to the selected six households in the village for 2004. Next year a new sample of six households was selected and we continued our visits. These visits (twice a month) to the selected households provided me with an easy entry into the community. In addition this relationship served to legitimize my presence in the village and make obvious my affiliation with scientific research. Therefore I used this opportunity to expand my network of informants and gain insight into the workings of the household economy. During these occasions I carefully observed the interaction taking place between the agent of the survey and the respondents. I also recorded facts about these rural households including personal information about household members (age, siblings, occupation), information concerning household economy (land property, land cultivation, produce from household plots/gardens and animal husbandry). In this manner I came to know the twelve households related to the official survey. Meanwhile I was cautious not to interfere with the work of the representative. Usually we completed one round of visits to the households starting from 11 a.m. until 16 p.m. Very often during these visits, the respondents treated us over light snacks and we extended our stay in order to enjoy the informal discussion. This was the time when respondents shared a lot of personal details concerning their family life, children and grandchildren (often residing in urban areas) and related life stories. In this way the framework of the survey helped me to stay in touch with these twelve households over a long period of time and follow their life trajectories. In some of the chapters I make use of the statistics and data collected by the survey to illustrate some of my arguments. Nevertheless as an anthropologist I remain sceptical about the validity of statistical representations. Therefore in this respect I see my task as filling in the gaps left by the official statistics and putting an emphasis on the social context and social relations.

[28] About details on HBS, see Appendix 4.

Observation

I came to Cherven to stay for one year starting from October 2004. Initially I contacted the village Mayor and he helped me find accommodation with the family of the local policeman, Iliya. For many years Iliya served as the only policeman in charge for several nearby villages, apart from Cherven. His network of contacts *(social network)* then spread well beyond the boundaries of the village. For that reason Iliya was a valuable source of information due to his long-term engagement with the problems of the area. His wife Rossi was not a full time employee at that time. Every morning she collected the surplus of milk produced by villagers and prepared it for transportation to a nearby diary farm.

Iliya and Rossi had two sons – Mitko (20) and Stefan (17) – living with them. At the point of my arrival to the village, Mitko had just completed his obligatory military service after finishing high school. Since he never applied to University programs, soon after coming back home he accepted a job at a local fishery as a guard. Stefan was still attending high school in Assenovgrad. The elderly parents of Iliya resided in the same house, thus it was a three-generational household. In a house next to the policeman's was the house of his elder brother and his family – his wife and their daughter with her husband, and their recently born baby son. In the year that followed the two brothers, their families and close relatives were my hosts and valuable informants. This extended family – four generations – lived on a shared plot of land near the central square of the village. Throughout the year I was gradually acquainted with their networks of close kin and friends in the village. I had the chance to observe their daily activities and join them for festive occasions. I was also very lucky to have two young informants in the host family – Mitko and Stefan. The elder brother Mitko especially helped me get access to their circle of close peers. In this manner I was able to see the village life from the perspective of the young people.

The relationship with my host family was beneficial for my research in several aspects – I could observe their household practices and patterns of interaction with close relatives and friends. Since the family was multi-generational I could see how people of different generations co-exist and develop their relationships in the context of a shared residence. I refer to Iliya and Rossi and their kinship group in Chapter 3 in relation to family farming and Chapter 6 in relation to social security. Understandably I was able to collect more information about this family group due to the greater access I had to their households.

I did not encounter major obstacles or problems dealing with informants in view of our different occupations, age or level of education. My urban background really did have an effect on my interactions with the villagers, but I am willing to see it as a positive rather than negative influence on my work. Furthermore I considered important to maintain a certain social distance from my informants in order to preserve my integrity and independence as a social researcher.

I also had some personal contacts that helped me in the course of my research. Nenka was a close family friend and through her I was introduced to important informants. Nenka, now retired, was the founder of the modern veterinary station attached to the village cooperative in 1959. She had spent eleven years in Cherven working as a veterinary specialist along with her husband. They two were responsible for all animal farms belonging to the cooperative, and often travelled to neighbouring villages to attend to their duties.

I obtained valuable information on the local community with a special focus on some aspects of daily life including local markets, social events, domestic and community rituals and celebrations, popular hobbies and local political meetings. Data collection in reference to the political activity at local and national level involved taking notice of the parties' pre-election campaigns on national scale (media coverage), and observing the pre-election activity taking place in the village. In addition I considered the villagers' reactions to events and their attitudes to local political actors. Through following the parliamentary elections in Cherven in 2005 and watching the nationally broadcast press conferences in the night after the elections I was able to establish a link between national and local contexts.

Interviews with Key Informants

Very rarely I recorded formal interviews in my daily interactions with villagers. Most frequently I relied on memorizing the conversations and recorded them in my field diary later. With a digital Dictaphone I recorded several structured and semi-structured interviews with key informants – the Mayor and the medical practitioner. It is worth mentioning that I had a very good working relationship with the Mayor who supported me tremendously during my stay at the village. He was very helpful in providing information about the village affairs.

I used the interview technique in cases when I needed specific information about a topic or a problem. Often I interviewed people having some prominent or leadership position in the

community like, for example, the former head of the agricultural cooperative Stephen Tochev. In the course of the fieldwork I decided to examine more closely two community sites – the local school and the chitalishte (the local culture house). For this reason I paid several visits to these village institutions. I relied on establishing personal contacts with the school Principal and the librarian of the culture house. I interviewed both of them to obtain information about the current functions of these community sites. These interviews were also useful in reconstructing the past and the present of these institutions. Local residents' reactions were of equal importance to me in reference to the culture house.

In relation to the developing rural tourism in Cherven, I interviewed the wives of the three hotel owners/managers. These interviews were structured according to specific themes mainly connected to owning and managing a family business: family relations, gender differences, sexual division of labour within the family enterprise, social differentiation, inequalities in status and incomes.

During the preparation (pre-fieldwork) phase in 2004, I prepared a questionnaire on rural households, addressing topics such as kinship relations, property and land ownership, living conditions and family life.[29] These questions I used only as orientation points for my conversation with the villagers. I did not take recorded interviews because I thought it was more beneficial for my study to rely on note taking after the conversations. During the visits to the households participating in HBS I was listening attentively and when appropriate asking additional questions – I was openly taking notes then. Usually rural people are not accustomed to advanced technology and I rightfully assumed recording devices could scare them off.

Archival Research

In the school I also looked at the school archives and had some valuable input from local records of the village history. I also found data about the cultural house in these records. In the district capital of Plovdiv I went to work in the archives of the city library and the regional archive. I found bits of information about the village in pre-socialist newspapers in the library archives. Documents about the village school, cooperative and culture house (chitalishte) I found in the regional archive. Overall there was little information in the archives concerning the village and its institutions.

[29] See the Questionnaire in Appendix 5.

Examining Contemporary Documents

In my research I found useful examining government documents related to specific programs and policies I discuss in the chapters. These documents are available on the official websites of the Ministry of Education and Science, the Ministry of Regional Development and Public Works, and the Ministry of Labour and Social Policy.[30] I also refer to papers presenting studies and policies of the European Union accessible on the website of the European Commission. I use the official statistics for Bulgaria provided by the National Statistical Institute to illustrate social tendencies.[31] I however acknowledge the problems using generalised information in anthropological research. In some cases I point to discrepancies between official statistics and my observations related to specific problems in the village. I also point to media coverage of specific events happening during the period of my field work – the most notable of these events was the parliamentary elections of 2005. Other sources of information about the village or related current affairs were some articles published in current regional newspapers.

In this chapter I have emphasized the shift in the ideological treatment of the problems of social inclusion and exclusion. In the next chapter I discuss the theoretical framework of the research by focussing on the main concepts, approaches and theories – *social and kinship networks, social capital* - and their relevance for the central theme of the research - *inclusion/exclusion.*

[30] Ministry of Education and Science: http://www.mon.bg
Ministry of Regional Development and Public Works: http://www.mrrb.government.bg
Ministry of Labour and Social Policy: http://www.mlsp.government.bg
[31] National Statistical Institute: http://www.nsi.bg

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Chapter 2

THEORETICAL FOUNDATIONS OF THE RESEARCH

In this chapter I review the main theories and concepts of my research on inclusion/exclusion. What I regard as the major contribution of the thesis is that the problems of inclusion/exclusion were investigated through the theories of social capital and networks.

Application of the Social Network Approach in Anthropological Research

My intention is to identify how social networks influence inclusion/exclusion processes in a rural community. What type of networks could there be and who are the people making use of such networks? In addressing these issues I need first to specify how I understand "social networks" and how related concepts and approaches contributed to this understanding.

The elaboration of the concept and analysis of social networks in the field of anthropology is owing to a team of researchers from the *Manchester school* (Scott 2000: 26-32). The most notable representatives of this research tradition were Barnes (1977), Mitchell (1969) and Bott (1957). Their studies advanced the understanding and application of social networks in anthropological research by introducing new methods and approaches towards investigating social relations. The Manchester researchers emphasized power and conflict as influential means of structural transformation. They focused on interpersonal networks, setting them apart from institutionalized roles and statuses in formal structures. Barnes (1977) conducted his research among the fishermen in a small Norwegian village. He studied the particular sets of informal interpersonal relationships (kinship, friendship and neighbouring) and their impact on community integration. Consequently Barnes developed the term "partial network" to specify a sphere of informal networks included in the totality of network relations. In the same time frame Elizabeth Bott (1957) did her research on British families. She applied the concept of networks as an analytical category to describe the various forms of kinship relations. Mitchell (1969: 36-39) further contributed to social network analysis by specifying the two types of actions characteristic of interpersonal networks – *communication* (information flows) and *instrumental* (transfer of goods and services). The quality of relationships in such networks could be analysed through a

number of concepts – *reciprocity, durability and intensity* (Mitchell 1969: 24-29); *reciprocity* refers to transactions and exchanges taking place within a relationship, *durability* characterises the lasting quality of the relationship (long- or short-term) and *intensity* reflects upon the strength of obligations inherent in the relationship.

Further applications of the network analysis were found in the works of Granovetter (1974) and Lin (1969). Granovetter (1974) studied the informal networks of workers in a Boston suburb in order to uncover the mechanisms by which they acquired information about availability of jobs. He then formulated his argument about the relative advantage of *weak ties* (distant relations with less intensive interaction) vis-à-vis the *strong ties* (close relations with more intensive interaction). In this regard he concluded that a worker was more likely to find a job via acquaintances with whom he had only limited interaction rather than through close family friends, family members, etc. By simplifying his argument one could speculate whether distant positions in one's networks represent more potential advantages or not. Another researcher from Harvard, Lee (1969) explored the informal networks through which women found an abortionist, in a context where the abortion was classified as an illegal practice. Both Granovetter and Lee focused on qualitative analysis of the networks they discovered; even so their contribution to the methodology of social network analysis is highly esteemed to this day.

In the preface to *Network Analysis*, Jeremy Boissevain (1973) makes clear that network approach has been developed as an alternative to the structural-functionalist approach that views society as a static structure but does not adequately explain people's behaviour in dynamic and more complex societies. At the core of the network approach lays the acknowledgment of the interactive and manipulating individuals who enter into relationships with one another to create complex and fluid social networks*:*

> "Network analysis is thus first of all an attempt to reintroduce the concept of man as an interacting social being, capable of manipulating others as well as being manipulated by them. The network analogy indicates the people are dependent on one other, not on an abstract society" (ibid: viii).

And Boissevain further specifies the characteristics of the network approach: "The basic postulate of the network approach is that people are viewed as interacting with others, some of whom in their turn interact with each other and yet others, and that the whole network of relations so formed is in a state of flux" (ibid: viii). Therefore the fundamental assertions of

the network analysis are based on the interaction among individuals and the fluidity of social networks.

In *Network Analysis* social networks are generally viewed in two ways: "as a system of relations which impinge upon individuals and influence their behaviour" and "as a series of relations which persons use to achieve their ends" (ibid). In my research I give priority to the second perspective – that is the instrumental use of social networks in the processes of inclusion/exclusion. Mostly I look at networks as a means of social inclusion and exclusion and try to assess how the accessibility and functioning of such networks could influence the individual and collective aspects of inclusion.

Mitchell further broadens the scope of social networks to include not only individual actors but also institutions and corporate groups:

> "Conceptualising the structure of social relationships in terms of institutions and groups implies that the initial abstraction must always be made from the content of the links in the network and higher order abstractions built up from the partial network so obtained" (Mitchell 1973: 33).

I would also like to consider the institutional aspects of social networks by looking at institutional transformations taking place in the village. The local cooperative, school and culture house (chitalishte) – all representative of community during socialism – are now undergoing a new cycle of reformations which is likely to put into question the capability and efficiency of the national policies of restructuring. The dependence of local institutions on state supports during socialism and afterwards provides the context for exploring the wider dimensions of the power relation between the village and the state. This relationship had its various implications in all periods of Bulgarian history, and now it has also become a channel for introducing new practices and discourses into the rural community. The role networks play in this process of social adjustment is worthy of analysis and the study of such networks should focus on local actors operating in the context of the transformational bond between the village and the state.

In my analysis I use the concept of social networks as an analytical tool and approach to studying social relationships. In this regard, however, I do not strictly adhere to the methods of social network analysis. I accept the main premises on which that concept is based – interaction and fluidity, articulated by Boissevain (1973, 1974). Mitchell's (1969)

emphasis on communication and instrumentality of social actions within networks is also useful to my research as much as these two characteristics reflect the way social networks can generate inclusive and exclusive practices and discourses in society.

The study on networks (in the way articulated by Boissevain (1974)) did not enter main stream anthropology for reasons mentioned by Giordano:

> "Though the project did not fall totally on deaf ears, it was never part of the anthropological *main stream*. The reasons underlying this decades-long indifference are many and should be reviewed. In the first place, we must note that a network analysis calls for a diligent and persevering field research, besides the contextualisation and constant comparison with ethnographic data acquired through other means of social research. Moreover, we should recall that until recently the interpretation of results was linked to the use of data processing systems that were hardly available and/or familiar to anthropologists" (Giordano 2003: 11, emphasis by author).

Among the "less empirical reasons" for "anthropology's lack of interest for the study of networks" Giordano underlines the anthropology's "notable emphasis on the moral dimensions within the social sphere" (ibid). In his view this emphasis on the "ethic value of human behaviour" makes the use of transactionalist approach and the notion of network it implies "inappropriate".

Nevertheless the concept and methodology of social networks were promoted through a series of publications (Wasserman & Faust 1998; Scott 2000; Klandermans & Staggenbord (eds.) 2002). Recently there has been a revival in the study of networks owing to the new challenges posed by the former socialist states. Since the fall of the communist regimes in parts of Europe and Asia, the concepts and methods of social network analysis enables the study of societies in social change and recently has been widely applied to studying, representing and interpreting the transforming economies and cultures of postsocialist societies (Sik 1994; Drbohlav 1996; Ledeneva 1998; Torsello & Pappova (eds.); 2003; Mozny 2003; Roth (ed.) 2007).

In Bulgaria "social networks" has also become a central approach in relevant research and publications (Bundzhulov 2003; Rajchev and Stojchev 2004; Deyanov 2008). The

explanatory power of the concept of social networks is further strengthened by the diffuse structure of the postsocialist Bulgarian society – in related academic studies it is viewed as a network society. Thus social networks are fluid and mutable; they dominate the social structure and facilitate reciprocal exchanges **(**Rajchev 2003) and capital conversions (Deyanov 2008) in the course of postsocialist social, economic and political developments. The constructed and re-invented networks of political, economic and cultural elites constitute the basis of the contemporary Bulgarian society and to a great extent determine its future development in the context of the European Union.

Kinship Networks: Context and Research

In the past the Bulgarian rural society was based on stable family ties and extended kinship networks. In contrast, the global society now is characterized by weak family ties and reliance on disperse social networks implying greater flexibility and mobility (Castells 2000, 2004). Using Mitchell's terminology then it could be expected that in a stable society, kinship and family ties would be characterised with high levels of reciprocity, durability and intensity, while this would not be the case in a dynamic society where more flexible and less durable network arrangements prevail. Given this context, I argue that the attributes of kinship networks defined along the lines of reciprocity, durability and intensity determine chances of inclusion and exclusion in the village. Then in order to approach the study of kinship networks as instruments of inclusion/exclusion, I first need to say a few things about their general importance for the families in the village.

My observation in the village led me to conclude that kinship networks play a major role in the social lives of individuals and families. They are determined by the norms of sociability, reciprocity and obligations among close and distant relatives. The rural family is traditionally characterized by cohesive and stable family arrangements – marriages usually take place early in life and are generally expected to last. Owing to the stable arrangement of the Bulgarian rural society, my main unit of observation became the family as defined by marriage and lineage (e.g. multigenerational family). The institution of marriage and the subsequent formation of residential households of nuclear or extended family type are crucial for ensuring the reproduction and survival of the future generations. The main purpose of my research then was to determine how family and kinship relations are being utilized for the purposes of individual and collective integration. In this regard I need to look at traditional norms and expectations that are decisive in mobilizing the support and solidarity within the kinship group.

The culture of Bulgarian *familism* was noted by Irwin Sanders (1949). A teacher at the American College in Sofia during the 1930s, he was interested in exploring the Bulgarian village life in a period preceding the establishment of the socialist state. His book, *Balkan Village*, projected a lively image of one Bulgarian village, Dragalevtsy, located not far from the capital city of Sofia.[32] His accounts of the dominant models of rural life characterised as *familism* are still useful in interpreting family and kinship relations - the basis of communal integration in pre-socialist Bulgaria (ibid: 144-160). Sanders paid considerable attention to family relations implying gender- and age-related subordinations, the economic functions of households and the lasting integrity of religious rituals in reinforcing kinship ties and communal spirit. The author implicitly pointed to various sources of social disintegration and exclusion: the growing separation among generations, the rural-urban split and the emerging gender divisions as marked by the growing emancipation of women. His insights about the familial basis of the small rural businesses and village co-operatives are also considered in my thesis in relation to present day related developments.

Sanders (1949) mentioned the reasons that contributed to the dissolution of *familism* and the traditional family arrangement of *zadruga* (the extended multigenerational family) as a dominant way of life – among these reasons were the western cultural influences (e.g. the French revolution, individualization and modernization aspects), land fragmentation, internal frictions associated with challenging the established authority of the elders, possibilities for greater social mobility, and education (ibid: 65-67). All these factors contributed to the gradual modifying and eventual obliterating of the traditional *familistic* way of life. These changes were however enormously accelerated with the advancement of the socialist project of modernization.

The advent of socialist transformations produced new strains on social and family relations. Milena Benovska-Sabkova (2004: 118) observes that "the elimination of private ownership entailed a reduction in the economic functions of the family" and this led to "a dwindling of the social territory of kinship". She then hypothesises that social networks formed on the basis of informal friendships at the workplace represented a *"hybrid type of sociability"* - an alternative to the kinship defined sociability of pre-socialism and a form of adaptation to the socialist reality (ibid, emphasis by author). This observation implies that the social functions previously related to kinship networks were relegated to professional networks formed at the workplace during socialism. In this connection Ivo Mozny (2003) writes how

[32] Dragalevtsy is now part of the capital city (Sofia) and has gradually become an expensive suburban area with luxurious residences. The closeness to the city centre and the Vitosha Mountain contributes to its attractiveness.

the socialist regime purposely sought to undermine the loyalty to traditional family and its values and replace it with a loyalty to the socialist state and its ideologically driven policies and institutions.

During socialism the research scope of the family and kinship - related studies was limited by the imposed ideological paradigm of the evolutionist Marxism. In this sense, independent academic interest in these topics was neither promoted, nor possible. The majority of academics who studied aspects of family and kinship relations in Bulgaria published their work after 1989 (Ivanova 1991 & 1998; Keiser 1999; Valchinova 1999; Benovska-Sabkova 2001a & 2001b; Kyurkchieva 2004; Boncheva 2005; Barova 2008, 2010).

To this day there has been no substantial academic research done on kinship networks and their applications in Bulgaria. Perhaps the first conceptualization of kinship networks as an object of study in the context of the contemporary Bulgarian society was done by the Canadian anthropologist Eleanor W. Smollett (1989). In "The Economy of Jars: Kindred Relationships in Bulgaria – An Exploration" she provides sufficient evidence that kinship networks in Bulgaria should not be taken for granted, but instead should become a subject of serious investigation. Kinship networks in socialist Bulgaria, she argues, have a profound significance to the personal and social life of persons. She identifies two spheres in which kinship networks play a vital role in supporting family and individual goals. These spheres are the subject matter of profound research:

1. Kinship as a source of personal support: in her account, Smollett identifies kinship relations as instrumental in socializing the individual. The ongoing process of social inclusion is made possible through intensive, frequent and mutually supportive relationships between close kin. The examples of practical help can range from providing childcare to supplying food. There are also other dimensions of kinship specified by Smollett such as the involvement of kindred in the life cycle and kinship based friendships (Smollett 1989: 132-133).

2. As a second most important sphere of kinship relations, Smollett identified personal ties (connections) and access to information:

> "People tend to use kinship relationships to smooth the way in managing their lives in society. They do so in *precisely* those life problems for which

> social methods of managing are not yet fully adequately institutionalized – areas in which there is *lag* in institutional development as society moves from one stage to another" (ibid: 133, emphasis by author).

Smollett associates the importance of kinship networks with the socialist development of Bulgaria. Indeed, her paper is published in 1989, which explains the theoretical framing of the argument. My own research in the sphere of kinship relations was done against a postsocialist background. My assumption is that the characteristics of kinship networks, described by Smollett, are still valid in postsocialism. The spheres, she identifies, are still representative of the content and function of kinship relations. Therefore, I incorporate and further develop her points in my research in rural Bulgaria in terms of:

- How is kinship instrumental in granting access to resources in different spheres – farming, family business, social security and politics?

- What is the significance of kinship networks in socializing the individual and generally facilitating the process of social inclusion? [33]

Reliance on kinship networks was widespread throughout eastern Europe. Other researchers of postsocialist societies noted similar tendencies in reacting to unexpected impoverishment and social disintegration. Andre Czegledy, for example, writes about the kinship and urban-rural relations in the case of Hungary:

> "Hobby plot produce is shared between relations, thereby acting as a material tie between rural and urban counterparts of a kin group. Such translocal cooperation is a common pattern throughout Eastern Europe, where the practice was once reinforced by food shortages and distribution deficiencies under state socialism" (Czegledy 2002: 204).

[33] Rajchev and Stojchev (2004) also acknowledge the importance of *kinship networks* for compensating deficiencies in private consumption and thus limiting the range of social deprivation and poverty after socialism. Two main spheres of activation of kinship relations are identified in their analysis: subsistence farming and labour migration (ibid: 70). According to a sociological survey conducted by the Gallup International in 1999 the Bulgarian "economy of jars" was estimated at 400 000 000 jars or about a quarter of billion EUR in monetary equivalent (ibid: 70-71). A precise estimation of the money transfers made from the Bulgarians working abroad (legally or illegally) to their families is not possible, but according to the Gallup International survey for 2003 these transfers approximated 1 billion EUR (ibid). These transfers as well as the real incomes earned are underreported and fall in the realm of the informal economy.

I have sufficient reasons to assume that the situation in Bulgaria is similar to the above descriptions for both periods – socialist as well as postsocialist. Indeed in Bulgaria the reliance on kinship and family networks strengthened to balance the negative effects of the social reforms in the last twenty years. In this regard it is important to acknowledge the urban-rural aspect of these relations which could be treated as one important point in the analysis on kinship networks and social exclusion. A major theme is the resource flow within kinship networks: people who had kept ties with their relatives in the villages were able to benefit from exchanges of resources – food and labour in the first place. Maintaining relations between urban and rural kin was one survival strategy determining the phenomenon, identified as the *economy of jars* - that is private production and preservation of food in rural households and its subsequent distribution among close members of the kinship group. Bulgarian sociologists (Tilkidzhiev 1998; Kelian 1998; Rajchev 2004) have also confirmed that kinship networks (urban-rural) and solidarity in exchanging food and services became part of the life strategies of many families. Dating back to the socialist years, the reliance on household production was strengthened after 1989 (Kolev 2002: 171).

Outside the former socialist world, the significance of social and kinship networks has been noted by anthropologists working in different political and social settings. Lomnitz and Perez-Lizaur, for example, consider networks as social capital in their account of one prominent entrepreneurial family clan in Mexico:

> "Each individual possesses a social network of relatives, friends and acquaintances, each of whom has their own similar network. This whole set represents the social capital of each individual. The social networks are built up in accordance with the principles of a particular culture. Its building block is the kinship system, which in Mexico has as its basic unit of solidarity the three-generational grand family"(Lomnitz & Perez-Lizaur 1989: 35).

Notably in this statement the authors regard kinship as the building block or "the core" around which other types of social networks are structured. It makes sense to assume that the more relatives the person has and is in contact with, the more extensive his/her social networks are, and then consequently more social capital is accumulated in such networks. So the advantages of belonging to a large family and kinship group could be easily detected. On the other hand, I hypothesise that in cases when kinship networks are

fragmented, they do not provide access to collective social capital – a situation indicative of social exclusion.

How is the study of kinship networks related to class relations and social inequalities? Although *class* is not a central concept of my research, social distinctions and relevant ideologies could not be dismissed altogether in a research dealing with inclusion/exclusion and related inequalities in status and income distribution. In the thesis I accept the theoretical model of Bourdieu about the vertical class structure and its relation to the concept of capital (Bourdieu 1987:278). Through his theory of capital, Bourdieu views class positions in society as vertical (depending on the size of possessed capital) and horizontal (depending on the content of possessed capital).

I touch upon issues regarding class relations in three of the thesis chapters: in Chapter 4 I discuss "class" in the meaning of social distinctions in connection to the legitimizing practices and discourses of the few enterprising families in the village; in Chapter 5 processes of class formation are considered with regard to the accessibility of quality education as a valuable form of cultural capital; and in Chapter 7 I review the definitive transformation of local kinship based elites and the accompanying mutation of the class ideology in Bulgaria.

Similarly Rutz and Balkan (2009) view social and kinship networks as associated with the accumulation of capital and instrumental in class reproduction in modern-day Istanbul. Therefore the impact of kinship networks and social capital on class formation is implicated in the study of various aspects of social transformations in the village.

In my analysis, inspired by related studies, I consider kinship and social networks in the context of family business (White 2000; Lima 2000), local politics (Lomnitz & Perez-Lizaur 1989) and social security (Finch & Mason 1993; Finch 1994; Pine 1995; Pine & Haukanes (eds.) 2005; Thelen & Read 2007). My hypothesis is that in all these spheres the accessibility and functionality of such networks are consequential and indispensable for individual and familial advancement and integration. In summary, a major theme of my research is to find out to what extent kinship relations in rural Bulgaria are instrumental in allowing access to resources and facilitating participation in the life of the community.

Defining Social Capital: Formal and Informal Social Capital

There are many studies indicating the role of social capital in the context of postsocialist transformations (Rose, Mishler & Haerper 1994; Kolankiewicz 1996; Dinello 1998; Eyal, Szelenyi & Townsley 1998; Wallace, Shmulyar & Bedzir 1999; Paldam & Svendsen 2000; Raiser 2002; Roth (ed.) 2008).

In this section I review the concept of social capital as defined in related theories. I focus on different categorizations of social capital: formal and informal (Wallace 2003) and collective and individual (Lin 2001). Ultimately I show how these forms of social capital are relevant to my research on inclusion/exclusion through kinship and social networks.

Portes (1998: 9) identifies three basic functions of social capital in the social studies related to: social control (Weede 1992; Smart 1993; Coleman 1988a & 1993; Hagan et al 1995; Zhou & Bankston 1996); family support (McLanahan & Sandefur 1994; Parcel & Menaghan 1994a & 1994b; Hao 1994; Gold 1995; Hagan et al 1996) and benefits through extra-familial networks (Granovetter 1974; Burt 1992; Anheier et al 1995). Of all these applications of social capital I consider "family support" as defined by kinship networks and "extra-familial networks" – or in other words, social networks outside the family and kinship arrangements. I have already demonstrated how I understand and interpret social and kinship networks in dialogue with related discourses in anthropology.

Claire Wallace presents this broadly accepted definition of the concept:

> "Social capital could be said to be the investment in social networks, investment that can bring returns in terms of reducing risk (Wallace, Schmulyar & Bezir 1999), improving health (Wilkinson 1996) assisting economic growth (Knack and Keefer 1997), and political stability (through encouraging trust) (Putnam 2000), reducing crime and even improving education results (Coleman 1988). Social capital is therefore seen as an important element of economic development and the World Bank has devoted a whole website to discussions about it" (Wallace 2003: 15).

Social capital as a theory-generating concept is commonly considered in connection to social networks and defined by Lin (2001:25) as "resources embedded in social networks accessed and used by actors for actions" and also "…investment in social relations with

expected returns (…) Individuals engage in interaction and networking in order to produce profits" (ibid: 6). This instrumental view of social capital has been challenged by other researchers like Pahl (2000) who believes that "social networks" could be substituted by the notion of *"personal communities"* – that is communities based on friendships that are established on the basis of shared interests but they could also be used as a means of providing practical help and support.

Social capital, according to Lin (2001) promotes *trust*, and therefore *trust* becomes an important signification attributed to social capital in the contemporary studies on postsocialist societies (Chavdarova 2001; Torsello 2003; Roth (ed.) 2007 & 2008). I do not make *trust* a central concept of my research, although I have to acknowledge the relevance it holds for the understanding of the social transformations in the Bulgarian society. The concept of *trust* gives us a clue for the explanation of the origin and resilience of personalized social and kinship networks in Bulgaria. To compensate for the deficiency of *systemic trust* (or distrust in the formal institutions) people resort to creating, managing and maintaining personalized social and kinship networks (Chavdarova 2004: 38-40). These types of informal networks are embedded in and correspond to traditional cultural values as opposed to imported social/institutional models. In the past the socialist centralization policies resulted in civic disengagement, social withdrawal and heightened distrust towards public institutions while at the same time reliance on personal and family networks strengthened as a counterbalance (Roth 2007: 10). Therefore the context of long-standing distrust in formal state structures could explain the resilience of social and kinship networks facilitating interpersonal exchange and interaction. These informal networks provide the socially acceptable environment of *trust* among individuals and enable social cooperation in different spheres. The negative aspects such networks entail are connected to clienteles, corruption, "amoral familism", negligence towards public spaces and public property (Roth 2007: 17).

In her further deliberation on the concept of social capital, Wallace (2003:16-17) differentiates between formal and informal social capital. According to this categorization formal social capital is related to public good, public institutions, achieved trust, and civic participation (bridging social capital). The main ideas related to formal social capital are developed by R. Putman (1994, 2000 & 2002) in relation to his work in Italy and later in the U.S. Informal social capital, on the other hand, can be noted in personal networks, ascribed trust and related to personal good (bonding social capital). Bourdieu (1983/1986) and Coleman (1988b) are credited for developing this side of the concept. According to those

views, formal social capital could be increased by promoting civic engagement, while informal social capital could be enhanced through investment in social contacts and building social networks for personal advantage.

In my thesis I also differentiate between the two types of capital. Informal social capital I regard as embedded in the informal networks of villagers – that is social and kinship networks. I show the use of such networks in several contexts: farming, family business, social security provision, and local politics (Chapters 3, 4, 6, and 7). At the same time I apply the notion of formal social capital in cases of institutional and community transformation. Hence local institutions such as the farming cooperative, the school and the chitalishte are regarded as forms of public good available in the community or formal social capital (Chapters 3 and 5).

I do not engage in a discussion to determine the relationship between the two types of capital. According to Wallace (2003: 18) they might co-exist, but not necessarily complement one another; still the case of societies in "transition" can exemplify the relationship between these two forms of capital:

> "This transition is fundamentally a process of accelerated institutional change. Both formal and informal institutions need to adapt to the requirements of market transactions. For democracy to work (in Putnam's memorable phrase) people must participate in institutions which regulate society – from Trade Unions and professional associations to political parties. For the market economy to work, there needs to be information and trust in market transactions – trust that if someone buys goods from you they will also eventually pay you. Where this cannot be guaranteed by formal institutions of law (because they are not yet developed or are imperfectly operating), informal institutions such as social networks can provide some insulation from risk" (ibid).

Wallace's position on the role of informal social capital (personal networks) is close to that expressed by Smollett (1989:133) on kinship networks as a means for compensating deficiencies or lags in institutional development during a period of social change (her argument was presented in detail in a previous section of this chapter).

The negative effects of informal social capital could be observed in relation to public institutions, political participation and networking:

> "However the reliance on informal social capital, not subject to universalistic public rules and regulations but rather to particularistic and ascriptive loyalties, could in fact undermine trust in formal public institutions and corrode their functions through corruption and "tunnelling" out of their resources for private ends" (Wallace 2003: 18).

It is suggested that "civil society" could counterbalance such negative tendencies by limiting and controlling the range of *"ascriptive and private loyalties"* (ibid).

The negative side of social networks and informal social capital is not only evident in cases of "corruption" and "systemic distrust" as interrelated social phenomena. Social networks can be instrumental in enforcing existing social inequalities (ibid: 21) and as such could become a powerful tool of inclusion/exclusion in the postsocialist societies.

In addition Lin (2001: 21) points to two general perspectives on social capital in relation to how the profit or return is accumulated – individually or collectively. Some scholars (Lin 1982; Flap 1988, 1991 & 1994; Burt 1992) emphasize the use of social capital by individuals – that is how individuals access and use resources embedded in social networks:

> "Thus, at this relational level, social capital can be seen as similar to human capital in that it is assumed that such investments can be made by the individual with an expected return (some benefit or profit) to the individual. Aggregation of individual returns also benefits the collective" (Lin 2001:21).

Other scholars (Bourdieu 1980 & 1983/1986; Coleman 1988 & 1990; Putman 1993 & 1995) developed the corresponding perspective considering the group use of social capital as a collective asset. In the conceptual framework of Bourdieu (1983/1986) the capital appears in three forms: economic, social and cultural. Social connections and obligations are the basis of social capital. Hence it is the membership in a group and participation in a network that gives access to the collectively-owned capital:

> "Capital, in this form, is represented by the size of the network and the volume of the capital (economic, cultural, or symbolic) possessed by those to whom a person is connected. In other words, for Bourdieu, social capital depends on the size of one's connections and on the volume or amount of capital in these connections' possession. Nevertheless, social capital is a collective asset shared by members of a defined group, with clear boundaries, obligations of exchange, and mutual recognition" (Lin 2001: 22).

Economic capital is the central form of capital, according to Bourdieu's theoretical model, as any other form of capital could be derived from it: "economic capital is at the root of all the other types of capital" and "every type of capital is reducible in the last analysis to economic capital" (Bourdieu 1983/1986: 252-253)" (Lin 2001: 22).

Another proponent of this perspective is Coleman (1990) who considered social capital in relation to structure and agency within this structure. Thus individuals act to make use of social capital available in their social environment/community seen as public good. Both Bourdieu and Coleman view closed networks as instrumental in maintaining collective capital and reproducing the group (Lin 2001: 23). In this way participation in and accessibility of such networks determine the processes of inclusion/exclusion in society. In this respect, Putnam (2000) regarded social capital as bonding (exclusive) and bridging (inclusive). Bonding social capital tends to reinforce exclusive identities and homogeneous groups. In contrast, the bridging social capital may be more outward-looking and integrate people across different social divides. It is obvious how these two types of capital could be associated with the central theme of the research – inclusion and exclusion through social and kinship networks.

In the next section I explain how I relate the two perspectives of *social capital* (individual and collective) to the two general approaches towards conceptualizing *social exclusion* – the French and the Anglo-Saxon. In my research the articulation and illustration of this connection is important for demonstrating how accessibility of social capital reinforces social inclusion. I assume the opposite is also valid – the lack of social capital (individual or collective) might produce *situations of social exclusion.*

Social Exclusion[34] – the French and the Anglo-Saxon Approaches

Borodkin (2000) differentiates two approaches towards conceptualizing *social exclusion* – the French and the Anglo-Saxon. The French approach emphasizes values typical of the French culture such as social solidarity and social participation (inclusion) in the life of the community (Silver 1994, 1995). The idea of *community*, as a dominant social structure, is highlighted in this interpretation of the concept. Therefore social exclusion is regarded as a group phenomenon and as a way of determining access to a given social circle. This particular perspective towards understanding and defining the concept is important in acknowledging the wider social context and the role of the social networks and social capital in shaping the processes of social exclusion and inclusion. Therefore this approach accentuates the importance of community sovereignty and group/minority rights. Consequently the French approach is channelling the relevant policies of the European Union aimed at encouraging social integration of marginal groups, and endorsing the establishment of social networks between residents of member states through various exchange programs in education and culture.

The Anglo-Saxon approach in defining social exclusion gives priority to individual freedom and equal treatment of individuals. This perspective puts forward the free will of individual actors in establishing social contacts and maintaining relations with the state and community. In the interpretation of the Anglo-Saxon liberalism underlined is the social differentiation resulting from the economic division of labour. In the context of the economic specialization, individual differences and skills are valued in relation to needs and efforts to satisfy them. Therefore, the Anglo-Saxon definition of social exclusion emphasizes the role of the *individual* in making use of personal resources (personalized networks and cultural capital signified by skills and education) for overcoming social exclusion. This definition proclaims the centrality of the individual personality and the development of its potential aimed at achieving satisfactory level of social integration. In this way social inclusion is related to the social protection of individual rights.

David Byrne (2005) explains how the two alternative approaches to *social exclusion* are related to different political doctrines. The Anglo-Saxon approach is rooted in the "the

[34]The first use of the term *social exclusion* is credited to Lenoir, Secretary of State for Social Action under Chirac's government. In 1974 he defined one tenth of France's population as *les exclus*: "…the mentally and physically handicapped, suicidal people, aged invalids, abused children, drug addicts, delinquents, single parents, multi problem households, marginal, asocial persons, and other "social misfits"" (Silver 1994: 532). These categories of people were not protected by the social security system in France at that time.

classical liberal position of "possessive individualism", with its emphasis on the negative liberties of the self, the optimizing function of the market, and that at best residual role of the collective sphere" (ibid: 19). The French approach is related to social ideas which emphasize "the social order as a whole and on the obligations which all members of the collectivity owe to that social order" (ibid: 33). These are the doctrines of the *traditional conservatism* notable in the 19th and early 20th century Catholic social teaching, the concept of *organic solidarity* (Durkheim 1893/1997) and the radical socialist position, exemplified by Marx. Such philosophies advocate collective regulation of capitalism in order to balance the system and prevent excessive inequalities (Byrne 2005: 34).

Furthermore I could clearly connect the two perspectives on social capital (individual and collective) to the two approaches to inclusion/exclusion – the French and the Anglo-Saxon. Bourdieu envisions networks as group dominated structures with clear boundaries. In this sense people who belong to the group (and the relevant network) could be regarded as included and vice versa - people who do not belong to the group are excluded from accessing the collectively maintained asset (social capital). Therefore group membership appears to be regulating accesses to resources and thus determining inclusion of members and exclusion of non-members. In this way inclusion could be considered in line with the French approach and related to Bourdieu's explanation of social capital as a collective asset.

My assumption is that *the French approach to social exclusion* is still valid in interactions and interrelations among people in Bulgarian society – that is people look for support from their immediate family/kinship group. Thus they still *rely on their group membership* to access valuable resources in many spheres: economic, political, related to social security, etc. Therefore my objective is to uncover and describe the mechanisms through which villagers make use of their kinship group or social circles to attain resources and satisfy their need for social and economic security. In this process it is important to consider the role of the state and its relevant policies on social inclusion.

Making use of social networks and family connections could be viewed as one successful strategy of social adjustment and social integration. Therefore in my cases I want to demonstrate the vital importance of kinship and family support in dealing with life crisis situations or situations of social exclusion. In my research I relate social capital in the sense of Bourdieu's (1980) interpretation of this term, to the French approach to social exclusion. The concept of social capital accentuates belonging to social networks and making use of connections within these networks for getting access to resources. Similar is the

perspective generated by the French definition of social exclusion which as mentioned before underlines the importance of group relations and social networking.

In my research I argue that during socialist times social capital was attached to community views of social inclusion (belonging to a distinctive/selective group was essential – for example, Party membership was central to advantageous social adjustment). During postsocialism political membership (political capital) is no longer that fundamental to social exclusion/inclusion since other forms of capital were re-valued – cultural and economic in particular. Therefore political capital does no longer determine one's position in the social structure and resources (privileges) this position entails to the extent it did before the fall of communism.

Nevertheless group membership as a source of social capital is holding potential beyond state politics. Other influential groups based on belonging to a family and kinship circle had retained their social implications throughout the two periods - socialism and postsocialism. In the context of the village I explore the functions of the kinship based networks (a specific form of social capital) and their potential to be transformed in other forms of capital – economic, and cultural (Bourdieu 1983/1986). Consequently my research questions could be formulated in the following way: how does social capital in the form of belonging to social networks (kinship and family groups) contribute to partially or fully overcoming social exclusion? What sort of networks are created and maintained in the context of the village? I assume that in a Bulgarian village kinship based networks are an important object of study in relation to social exclusion.

On the other hand, the first perspective on social capital that focuses on the individual could be related to the Anglo-Saxon definition of inclusion emphasizing the development of the individual potential and the importance of the individual rights. In the same way the theory of human capital could also be associated with the Anglo-Saxon definition since human capital could also be regarded as an investment an individual makes for getting good returns in the labour market. Regarding this view, my intention is to demonstrate how the individual forms of social capital, (e.g. cultural capital in the form of educational credentials) could be instrumental in the process of social inclusion. In Chapter 5, with regard to community transformation, I touch upon the significance of the cultural capital in relation to an IT project carried out in the local school.

One interpretation of social exclusion is based on the three paradigms identified by Silver (1994, 1995): solidarity (rooted in the French Republicanism), specialisation (based on

Anglo-American liberalism) and monopoly (advocated by the European left). All of the three paradigms conceptualize social exclusion in different ways. The solidarity paradigm views exclusion as "rupture of the social bond between individual and society" (Yates 2004: 36). According to this paradigm individuals are participants in the social life rather than bearers of rights. This philosophy of the collectives underpinned the French approach towards social exclusion, as mentioned above. Understandably the specialisation paradigm views people as bearers of rights and responsibilities who engage in voluntary exchanges. Exclusion, then happens when "group boundaries impede individual freedom to participate in social exchanges" (ibid). Thus exclusion is a denial (discrimination or negation) of the individual rights – the basis of the Anglo-Saxon approach to social exclusion. The last paradigm, the paradigm of the European left, regards exclusion as a result of group monopolies which serve the interests of the included. Outsiders could be included via citizenship actualised through participation in community (ibid: 37).

Regarding social exclusion, Levitas (1998) presents three related discourses in Britain. The moral underclass debate (MUD) explains poverty and social exclusion through focusing on the poor people and their behaviour. The social integration discourse (SID) regards exclusion in terms of a relationship breakdown between the individual and society. In this view, inclusion and integration could take place through paid work (economic integration in the labour market). The redistributionist discourse (RED) views poverty as the main cause of social exclusion – this approach is notable in Townsend's work. Both MUD and SID discourses focus on individuals and their behaviour as determinants of social exclusion leaving aside structural constraints.

Above I have presented the leading typologies of social exclusion in order to illustrate the variety of approaches towards conceptualizing it. In my research I would like to focus on the two approaches – the French and the Anglo-Saxon in the context of my case studies from the village. Hence I demonstrate how in the analysis of exclusion/inclusion in the contemporary Bulgarian society the emphasis on the individual has to a great extent replaced the priority given to community and its values of solidarity and participation, notable during socialism. Therefore, roughly speaking the Bulgarian cases present a strong evidence for the triumph of neoliberalism over the social ideas of transformational Marxism.

Situations of Social Exclusion

In my research I find useful the proposed classification of *situations of social exclusion* proposed by M. Wolf (1994: 81-102):

- *Exclusion from means of existence* (The low nominal incomes due to high inflation rates result in decreasing standards of life, blurring of class distinctions and ambivalent class self-identification.)
- *Exclusion from social services, welfare and social security nets* (Normally the social rights guaranteed by the state include the right to education and employment, health care and accommodation. When the range of social services provided by the government is significantly reduced, the list of marginalised groups expands.)
- *Exclusion from culture-related consumption* (That is access to information and modern technologies, e.g. computer and Internet.)
- *Exclusion from political participation* (Even when free elections are possible, political choice and representation is not easily attainable due to the prevailing system of political oligarchy.)
- *Exclusion from membership in organizations and solidarity* (Inadequate development and function of civil society organizations, professional unions and other cooperative associations could result in decreasing social solidarity and exclusion from resources.)
- *Exclusion from opportunities to assimilate current affairs* (The exclusion from "information society" (Toffler 1990) could result in limited strategies for social adjustment.)

This classification I find helpful in identifying related cases in the village. My intention is to demonstrate how people make use of social networks and related forms of social capital (political, cultural and economic) to alleviate *situations of social exclusion.* Many inhabitants in rural Russia are experiencing *situations of social exclusion* in a way that affects their chances of finding suitable employment, receiving adequate social assistance and health care and benefiting from culture and education (Tchernina 1994 cited in Borodkin 2000). I assume the same evaluation holds true for rural areas in Bulgaria. For that purpose it is essential to take into consideration those spheres in which it is more likely to encounter *situations of social exclusion*: labour market, education, gender relations, social security, and markets for goods and services.

Social Exclusion and Poverty

The concept of social exclusion has several aspects – *descriptive, analytical* and *normative* (Gore 1994; Borodkin 2000). The analytical perspective explores social exclusion in its relation to poverty, employment, and social integration. A. Sen explores the concept mainly in causal analysis along with defining poverty as *capability deprivation.* In this sense poverty acts to limit personal freedom to do valuable things and is linked to the inability to take part in the life of the community (Sen 2000: 5). Other analysts emphasize *access to resources* in reference to social exclusion and poverty: when people are denied access to vital resources, they live in poverty (Townsend 1993). By this assumption poverty could be regarded as synonymous to social exclusion. However it is not always the case that poverty and social exclusion could be used interchangeably. The concept of social exclusion is applied to explain complex social phenomena, not always limited to poverty. Therefore exclusion could have many other dimensions: religious, linguistic, ethnic, economic, political, cultural and sub-cultural, gender-related, etc.

Samantha Yates (2004: 24-37) elaborates on the concepts of poverty and social exclusion in the introduction to her doctoral research on poverty in contemporary Russia. In her theoretical framework poverty is related to low incomes and minimum subsistence needs, lack of entitlements or failed entitlements, and capability deprivation. Poverty in all these aspects is connected to social exclusion as a complementary concept (ibid: 38-41). Yates further specifies the relationship between poverty and social exclusion by making a reference to Room:

> "Room has argued that poverty is economic (distributional) and social exclusion is social (relational), "The notion of poverty is primarily focused upon distributional issues: the lack of resources at the disposal of an individual or household. In contrast, notions such as social exclusion focus primarily on relational issues, in other words, inadequate social participation, lack of social integration and lack of power" (Room 1995: 5)" (Yates 2004: 39).

Poverty in academic research and statistical surveys is related to income distribution and measured through social, subsistence and survival minima in Bulgaria (Mitev at al. 2001: 34-36). Since the early years of transition a good indicator of poverty in Bulgaria is *the relative share of general consumer expenses made up by food.* According to this indicator people who spend around 40-45 % of their income on food are classified as poor (ibid).

Credit accessibility has recently become a measure of poverty as well. According to Bulgarian experts, people living below the poverty line (approx. 1 million people (450 000 households) or that is around 15% of the total population in Bulgaria) cannot afford taking consumer credits.[35]

In my thesis I do not focus on distributional aspects of poverty, as measured by income distribution, poverty line or subsistence minimum. However, I need to acknowledge the relevance of these approaches and their applicability in academic and policy-related research on social exclusion in Bulgaria. In my research I consider poverty and social exclusion as complementary concepts. Social exclusion, however, is the "relational" aspect of deprivation and as such has much to do with social networks and social capital embedded in such networks. Therefore I explore social exclusion and inclusion through kinship and social networks and determine the relevance of such networks in dealing with situations of social exclusion.

In the preceding first chapter I have described the general social and political context in which I carried out my studies on social exclusion/inclusion by emphasizing the shift in the ideological treatment of this central theme. In addition to the methodology of the research I have also presented the profile of the region and the village where I carried out field work activities for one year, 2004-2005. In this chapter I have defined and reviewed the main theories and approaches related to social and kinship networks, social capital, social exclusion and inclusion. I have highlighted the central points guiding my doctoral research in the Bulgarian village, Cherven. In the chapters that follow I connect these theories and concepts with field work findings and describe cases revealing the potential of the theories in explaining social transformations.

[35] Bogdanov, B. Debate about population indebtedness in Bulgaria organized by the Bulgarian Academy of Sciences, 14 October 2009.

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Chapter 3

AGRICULTURE IN CHERVEN: EXCLUSION FROM THE LAND

General Context

This third chapter is about farming in Cherven considered as a dynamic economic and ideological practice. My intention is to present the developments in the village in the context of the national economic restructuring after 1989. In relation to the theoretical framework of the thesis I formulate the main point in the chapter as "exclusion from the land" – a term developed to illustrate the sharp decline of agriculture as a sector of national economy after 1989 and the subsequent disengagement of the majority of the population from farming activities. My objective is to develop this central idea in relation to three levels of analysis: the village cooperative, private farming and household production. Therefore I first examine the local cooperative as a formal structure emblematic for the planned economy of socialism. On the next level I study farming as a professional orientation chosen by a few private farmers in Cherven. I also focus on some village households and try to evaluate the level and scope of household production through specific examples.

For the purposes of my analysis I need to briefly introduce the general context of agricultural development in Bulgaria. After the end of World War II land collectivization was enforced to facilitate the transfer of economic resources (e.g. labour force) from the Bulgarian rural areas to the industrializing urban areas (Znepolski 2008: 201; Dimitrov 2001: 29). By the end of 1950s land collectivization was finalized and hence agriculture became a sector organized by state cooperatives (Kolev 2002: 209).

Creed (1998: 69) explicitly demonstrated in his research how household strategies greatly influenced the state reforms related to agriculture during socialism. In addition Creed made an in-depth analysis of government reforms directed to increase productivity or stimulate private cultivation of land through distribution of private plots. His argument about how villagers influenced the reforms and in this way were able to domesticate and transform the socialists system points to the high flexibility of

the socialist state, constantly producing policies to match the emerging alternatives of development in agriculture. Transitions from one form of agricultural organisation of labour and productivity to another were ongoing throughout the socialist period (1944-1989).

Very often the state regulations created enduring effects on household structure and kinship relations. During the past 20 years along with changing lifestyles and consumption patterns, many rural residents were compelled to adapt to new stringent reforms in agriculture (Kelian 1998: 164-181). The postsocialist land reforms brought forward new problems to be resolved within the village communities and households all across eastern Europe (Creed 1995&1998; Ivanova 1995; Kaneff 1996; Verdery 1999; Dunn 1999; Meurs 2001; Hann 2003). In Bulgaria a large-scale liquidation of cooperative farming was followed by a restoration of land ownership rights. Immediately after the private ownership of land was restored, new village cooperatives started to take shape.

The whole process of decollectivisation and destruction of the socialist cooperatives was first and foremost driven by a political-ideological agenda of the West (Burawoy & Verdery (eds.) 1999; Mandel & Humphrey (eds.) 2002; Hann (ed.) 2002) but among the secondary effects were the declining outputs of agricultural production, and a subsequent loss of the former Soviet markets. Today the state subsidies for agriculture are limited and the new group of private farmers receives inadequate assistance (Dimitrov 2001: 88). In addition the state has implemented various measures for price control in support of consumers (Kelian 1998: 165).

Given this historical background, my intention is to demonstrate how the local practices and discourses are in turn shaped by national policies and ideologies. In this relation I would like to address several aspects of the rural economy rooted in socialism: the persistence of subsistence farming on private plots usually organized along family and kinship lines; an assessment of the market-oriented production taking place in village households. In addition I present two cases of independent large-scale farming and speculate whether such type of private farming has the potential to provide employment for the rural population or not.

Cooperative Farming in Cherven during Socialism

The roots of the cooperative movement in Bulgaria could be found in the first years after the National Liberation (1878). Even though individualistic practices and discourses in economy had expanded at that time, the collectivistic attitudes continued to permeate large layers of society. Back then the cooperative had been the most popular form of economic organisation based on the traditions of collectivism (Kolev 2002: 183-184). The cooperative developments in agriculture had gained momentum in pre-socialist years and consequently were later institutionalized, administered and controlled by the socialist state. In Bulgarian scholarly literature before WW II the cooperative was considered as catering to the needs of exploited groups, small and average landowners (Donchev 1939: 16-17). However, while the cooperative had been used as a corrective to the capitalist system worldwide, in Bulgaria it was regarded as opposing all capitalistic forms (Bochev 1998: 253). For that reason Bochev (ibid) would consider the opposition between individualism and collectivism as reflected in the conflict between the European civilization (based on industry and individual entrepreneurship) and the collectivistic and socialist ideologies infusing the economic practices and discourses in Bulgaria. Another Bulgarian researcher, notable for her study on informal economies, T. Chavdarova (2001: 149-150) attributes the formation of cooperative property as the only feasible option for economic development in a poor country with limited capital resources such as Bulgaria.

Driven by this ideological framework, the land collectivization in rural Bulgaria was ongoing in the 1950s. The private cultivation of land was terminated as 1.5 million landowners were compelled to join the farming cooperatives (Kelian 1998: 169). This development had a great impact on the rural population. One American anthropologist G. Creed (1998) gave an account of the ways collectivization was enforced in a Bulgarian village, Zamfirovo. A large body of literature exists to account for the history of agricultural development in Bulgaria, including collectivization and cooperative establishment (Donchev: 1939; Totev: 1940; Georgiev: 1994; Migev: 1994; Avramov: 2000; Zlatev: 2000).

I discovered documents about the foundation and subsequent reformation of the cooperative in Cherven in the regional archive, located in the district capital Plovdiv.

According to one such document, dated from December 2, 1966, the first village cooperative was established on September 2, 1945 by "a group of poor and average villagers". Only three households in Cherven had close to 100 dekar of land during collectivization. The first to join the cooperative were the poorest 19 families in the village, according to informant Stefan Tochev. Stefan is now a pensioner residing in Cherven. During socialism he was a prominent cooperative leader responsible for organizing the cooperative production and distribution. He then remembers how the local farming cooperative used to function during the socialist times. I met him with the help of the village veterinary practitioner at that time, Nenka.[36]

The basic idea behind the creation of the first cooperative was to "guarantee the material and cultural welfare of the landowners", as stated in the archives. According to Stefan, by 1956 all villagers joined the cooperative and consequently the collectivized land reached a total of 12 000 dekar.[37] Additionally the cooperative had inherited 40-50 year old vineyards of around 3500 dekar. From 1960 onwards the sort *cabernet sauvignon* was introduced for the first time in the region.

In the documents from the regional archives I discovered how the village cooperative was reorganized many times before its final liquidation in 1992. In 1962 the cooperative was enlarged to include the farming land of the neighbouring villages Dolnoslav, Gornoslav, Oreshets, and Dobrostan. In 1970 the cooperative was transformed into a branch of the agricultural cooperative in the municipal capital of Assenovgrad. In this way the village cooperative was no longer an independent economic and legislative unit. In the framework of new national policies with respect to agriculture, in the period 1979 – 1983 the branch was then a part of the enlarged agricultural complex in Assenovgrad. About this episode I would cite the opinion of one villager, Martin.[38] Born in 1935, he served as a bookkeeper at the local cooperative in Cherven and after the reformations - at the agricultural complex in Assenovgrad. Martin admitted that the amalgamation of agricultural production into agro-complexes all over the country was a big mistake because in doing so the more advanced

[36] Nenka is a personal contact I had in the village. I first mentioned her in the methodology section of Chapter 1.
[37] 10 dekar = 1 ha; the dekar is commonly used in Bulgaria.
[38] I met Martin (fictional name) during the habitual visitations to the households chosen to participate in the Household Budget Survey conducted in the village for two consecutive years (2004/2005). For more details on HBS see Appendix 3.

cooperatives had to compensate for the less advanced. Yet, additional reformation followed and between 1984 and 1986 only a work brigade from the village was listed as part of the same complex. This brigade encompassed the neighbouring village of Muldava in 1987 – 1989. A new cooperative was established in 1990 as a legal unit independent from Assenovgrad, this time excluding Muldava. In 1992, following another administrative reorganisation, the cooperative in Cherven was publicly announced to be in a process of liquidation.

As the archival document shows the process of reformation reduced the first cooperative to only a branch of the complex in Assenovgrad. Subsequently the branch became a simple work brigade (later mixed with the neighbouring village of Muldava). Although I could not find any explicit evidence, nevertheless, I suggest that these reforms were initiated to conform to the declining level of agricultural production in the village, and probably the deficiency of workers. Notably a few years before its official liquidation in 1992, the cooperative was restored as an independent unit. Therefore the frequent changes in the administrative status of the formal agricultural structure in the village testify to the many reforms introduced in the sector of agriculture during socialism in the Bulgarian countryside (Creed 1998).

Meanwhile, in the 1960s the cooperative had several work brigades, Stefan told me. First of all I was curious to find out how many people worked in the cooperative farming during its best period. To my inquiry Stefan explained that the work brigades were specialized according to the type of work: three field brigades employing in total approximately 600 villagers, one brigade of 70 people specialized in animal husbandry, and one construction brigade of 80 builders. To properly estimate the level of agricultural employment in the context of the village population then, Stefan approximately evaluated the number of residents at 1500 people occupying 415 houses. From his estimations I drew the conclusion that farming was then a dominant form of employment and a source of livelihood in Cherven. In other words the village economy was based mostly on cooperative farming where most of the villagers found jobs and earned satisfactory incomes.

In these years according to information from Stefan, confirmed also by Nenka, the cooperative was very successful and had established a reputation of an exemplary

organisation known in the whole region. The cooperative had contractual agreements with major state monopolist enterprises of cigarettes and wine manufacture. A major part of the produce – fruits and vegetables – was exported to the markets of the Soviet Union and other socialist countries. Exports were also made to the Western capitalist countries in exchange for hard currency. The currency, however, went to the state budget (as Stefan rightfully pointed out, the state was subsidising the public healthcare and education) but the local cooperative received the monetary equivalent in the Bulgarian national currency – BGN. Another informant also confirmed that much produce was exported to both socialist and capitalist states. The only difference was not quality but packaging.

The archival documents do not say anything about the way production was organized and the type of enterprises operating within the cooperative. Through my informants, Nenka and Stefan, I found out that the cooperative had several well maintained farms specialized in animal husbandry – chickens, pigs, milk cows, sheep, and other animals used in the production cycle. During the liquidation all of these farms were shut down and their resources squandered. That was the fate of one exemplary farm for elite milk cows imported from Holland. During socialism this farm was the winner of many regional competitions. While mentioning these facts my informants felt regretful about the village glorious past irretrievably gone.

Stefan explained how during socialism the local managers had control over the organisation of production: what was produced and how the produce was marketed. The cooperative produced large quantities of milk, meat, vegetables (e.g. best quality peppers), fruits and grapes. Traditionally tobacco cultivation was a major source of livelihood. In the years preceding 1944 the tobacco cooperative "Nikotiana" in Assenovgrad had members in Cherven; all of them were engaged in cultivation of a particular brand of tobacco "Harmanli". The village had in total around 1000 – 1200 dekar of tobacco. According to the Mayor "there was no household in the village which had not been engaged in tobacco production." The workers were highly motivated by the good remuneration and other stimuli including vacation trips abroad (usually in the former socialist block). Back then villagers were earning well enough to significantly improve their living conditions. I noticed that the majority of houses in Cherven were built at the end of 1950s and the beginning of 1960s – a period of significant economic

prosperity in the village. Gradually tobacco became less and less important in the village economy.[39] For several years after the political change from 1989 Bulgarian Turks from other places came to cultivate tobacco in Cherven privately. In the last 4-5 years tobacco cultivation in Cherven was abandoned altogether.

In cooperative farming the speeded mechanization of agricultural cultivation and processing left part of the village population unemployed. Then the local governance contacted the management of one of the big industrial enterprises in Assenovgrad and arranged for the opening of a local branch in the village. The enterprise *Assenova krepost* was producing plastic products and its local branch in Cherven offered employment to 35 women workers during 1960s and 1970s. Later the major fashion enterprise *Valentina* opened a local branch at the same location employing more workers. Similar local initiatives for creating jobs for the unemployed rural population have been examined and described in G. Creed's account of the rural industrialization or in other words the industrialization of the Bulgarian countryside (Creed 1998: 149-183). Through this policy the socialist state was striving to overcome the rapid depopulation of villages resulting from industrialization and urbanization.

For comparison in 2005 the small private enterprises still operating in the village, the parquet producing factory and the shoe manufacture, offered only limited employment for village population. There had never been a major industry located in Cherven during socialism or after, probably because the main specialty of the village had always been agriculture. The village economy certainly experienced many shifts from the early establishment of cooperative farming to the present day expansion of rural tourism. I will continue to explore this transition in the next chapter. But before considering these modern forms of economic growth I was provoked to examine what happened after the official liquidation of the cooperative farming in the village.

[39] I could only speculate why tobacco cultivation became less important in the village economy. One possible reason could be that being a labour-intensive crop tobacco is no longer that attractive to younger generations of villagers. Another reason for eliminating tobacco production is the low profitability of tobacco in the recent years in comparison to the socialist period.

Local Alternatives to State Cooperative Farming

The New Private Cooperative

To my question "*why was the state cooperative farming in Bulgaria liquidated?"* Stefan replied that "we (Bulgarians) always follow models imported from abroad". I dared to suggest one possible explanation - mainly "the corrupt political elites". Stefan rather agreed with me. In Cherven the liquidation of the cooperative assets provoked common discontent which however never developed into organized protests. Therefore the village cooperative was easily subjected to the common procedure of liquidation.

As Creed (1995&1998) and Kaneff (1996) demonstrated in their respective research these structural changes led to an ambivalent transition since the market mechanisms did not yet function well in the open Bulgarian economy, especially with respect to agriculture. The new agricultural policy of the state directed towards the restitution of ownership rights had a controversial impact on the rural development. While during land collectivization the landowners were estimated at 1.5 million, currently the total number of landowners and their heirs in Bulgaria according to a recent estimation is 4 million (Kelian 1998:169).

Decollectivisation of land as manifested in disestablishing state farming cooperatives opened space for personal initiatives. After the state discontinued its economic support for cooperative farming, the local actors in Cherven were forced to negotiate how to manage access to resources and organize production in the reformed cooperative. The individual landowners (after land restitution) had to choose how to make use of their available economic resources (land, labour, capital, initiative). In Cherven joining the new private cooperative was voluntary and many villagers contributed their land in exchange for annual rent.

The Mayor shared a few details about the decollectivisation and the establishment of the new private farming cooperative. In 1992-1993 the liquidation of the former cooperative took place. Auctions for property liquidation were organized in 1994. The new cooperative was established in 1995 with a membership body of 1044 villagers.[40]

[40] Generally the number of cooperative members includes in addition to landowners who are permanent residents in Cherven, landowners and their heirs who reside in urban areas. For that reason, the number of 1044 cited in the text does not correspond to the village population of approx. 802.

The land in the cooperative was 11 000 dekar in total, including roads, valleys and pastures. In addition, the State Land Fund in the village comprised of 150 dekar.[41] In 2005 the cooperative had approx. 8000-8050 dekar of arable land at its disposal.

The formal structure of the village cooperative consisted of four bodies: one chairman, seven members of the ruling council, five members in the control council and a general assembly consisting of all the other members of the farming cooperative. These bodies had distinctive rights and responsibilities ensuring the good management of the farm. The general assembly selected representatives to both councils and appointed the chairman. The general assembly was called to decide upon each matter, concerning the working of the cooperative. In principle, issues related to cultivation, crop yields and rent payment were brought up for public discussion by the ruling council. During the annual general meeting the chairman was responsible for giving an account of the work done during the previous year; he was also in charge of all organisational matters. The control council was in charge of inventory and accounting. The Mayor was also a member of the ruling council. My informant Stefan had been the chairman of the re-established cooperative for seven years since 1996.

Each year in March the cooperative held its annual meeting to settle accounts and process selections. The signed agreement between the cooperative and landowners expired in August 2006. The landowners belonging to the cooperative frequently complained about the low rents and land fragmentation. In August 2005 the cooperative began distributing rent among the land holders - 20 kg of wheat per 1 dekar of land deposited in the cooperative. Therefore, if a villager had deposited 5 dekar of land in the cooperative, he would get 100 kg of wheat as an annual rent. Then he/she could sell the wheat to the cooperative at a fixed price of 0.13 BGN or could also deliver it to the grocery shop in exchange for bread coupons. I discuss in detail this common household practice in the next sections of this chapter.

During the liquidation of the former cooperative the animal farms were squandered and much of the vineyards destroyed. In the past the village had the biggest vineyards in the

[41] The State Land Fund comprises of around 235 000 ha of farming land – private state property. The directors of the regional divisions of the Ministry of Agriculture and Food manage the usage of these land funds in the 28 administrative regions in Bulgaria. (Source: Ministry of Agriculture and Food: http://www.mzh.government.bg)

region – close to 3000 dekar. In 2005 there were around 800 - 700 dekar left of privately owned vineyards. Around 80% of the owners had only one dekar of vineyards as a result of land fragmentation. The new cooperative was poor, villagers would say, because vineyards were not part of the cooperative communal fund, but were privately cultivated. Stefan estimated that 300 dekar of these private vineyards were not at all cultivated in the last years (2005-2007). Many villagers neglected their vineyards pressed by the low purchasing prices of grapes set by the local monopolist – the wine factory in Assenovgrad. [42] Therefore high production costs associated with small scale farming and low prices on local markets were common disincentives for the village households.

Following the cooperative standard rules, membership was granted to villagers who contributed at least 15% of their land to the communal land fund. In comparison, other village cooperatives demanded that members contributed all the land they owned. This was the case in Topolovo (a village situated 7 km from Cherven) where the Mayor did not allow partial contribution of land and vineyards. Until recently Topolovo residents did not possess any vineyards but in 2005 they already cultivated around 1000 dekar. The Topolovo cooperative was affluent because the vineyards - a source of considerable income - were cultivated by the cooperative, not by individual owners.

On the contrary, in Cherven people could make a partial land contribution and keep their vineyards for private cultivation. Many families, including my hosts, cultivated their vineyards and profited from the sale to the winery in Assenovgrad. Other villagers willing to make earnings as well rented vineyards from owners and later split the profits from the sale of grapes to the local winery. I heard villagers regretting that the cooperative in Cherven was struggling to survive: it could barely repay its debts which were reduced in the current years from 150 000 BGN to 50 000 BGN. The crisis in the cooperative farming was blamed on the mismanagement by the head of the cooperative. At the same time, they approved the strategic management skills of the Mayor of Topolovo who retained the vineyards within the cooperative – a move leading to financial stability.

[42] Information about the wine factory "Assenovgrad" Ltd could be found on the company's official website: http://www.mavrud.com/en/index.htm

After the establishment of the new cooperative in 1995 the level of agricultural production in the village could not match the level attained during socialism. The new cooperative did not have enough income to purchase machinery and fuels. The available equipment was out-of-date. The old machines often malfunctioned and needed constant maintenance with expensive spare parts. As a result, the land was not properly cultivated.[43] Eventually both the range and the quantity of agricultural production drastically declined after the official liquidation of the cooperative resources in the early 1990s. I did not find exact information about the level of output during socialism neither in the village archives nor in the regional district archives. My impression about the level of output in the village was influenced by local informants. Following the Mayor's account I recorded a few facts from the history of cooperative agriculture in Cherven. He claimed that until 1989 the cooperative cultivated 4000 dekar of wheat, 1000-1200 dekar of corn, 800-1000 dekar of tobacco, 3000 dekar of vineyards, and 400-600 dekar of lucernes. The cooperative used to produce peppermint due to available market. Until 2000-2003 the cooperative produced 500 dekar of red pepper. In 2005 there was red pepper - 150 dekar privately cultivated by the farmer Peter Zheliyazkov.

The cooperative now produced only fodder - wheat and corn in order to pay for the annual rent of landowners. More specifically in 2005 the cooperative cultivated wheat – 3000-3200 dekar, corn – 200 dekar, and sunflower – 1600 dekar. Therefore the cooperative no longer produced in large quantities for domestic or foreign markets as had been the case during socialism. The agricultural produce from the cooperative was consumed only locally. Similarly the employment in agriculture in Cherven fell short of the levels attained in the past. Consequently the number of full time employees in the cooperative was reduced and at present varied but did not exceed 9 – 15 people, including the management, guards and mechanics.

The history of cooperative farming in Cherven testifies to the overall drop in agricultural production in the Bulgarian economy over the last decades. The idea I introduced as "exclusion from the land" could be understood in macro and micro

[43] The cooperative has a very cheap insurance because of insufficient funding. The usual practice is to insure only 2 blocks of land and later negotiate with the insurance company the adequate payment in case other blocks are damaged. In 2006 the cooperative did not get any payments as compensation since the damages were estimated to be under 4-5% of the insured property. In the previous year 2005 for the damages resulting from the bad weather conditions the cooperative received 4000 – 5000 BGL as compensations.

economic terms. Therefore limited state subsidies for agriculture as a sector in the national economy and deficient local resources (e.g. capital, labour, and technology) resulted in "exclusion from the land" as evidenced in a major decline in production and consumption.

Individual Private Farming in Cherven

The father of my hostess, a representative of the older generation of villagers, confirmed that during socialism the cooperative farmers were able to produce a wide variety of products that were exported to the huge market of the Soviet Union and other socialist and capitalist countries. The new political orientation and the introduction of the open-market economy in Bulgaria and in the countries of the former socialist block led to the collapse of the market system on which rural areas used to rely.

The relationship between the villagers and the state had also been changed after 1989. Not long ago the state was perceived as the unshakable authority that governed every sphere of life during socialism. Even villagers in their early 40s had grown to depend on the state for providing employment, social security and tolerable if not the best living conditions.[44] Under the open market economy they had to learn how to survive without the state, assuming personal responsibility for all decisions concerning their families. They had to choose from a variety of available alternatives and escape potential dangers. In this chapter I give a more specific example: since agriculture was no longer subsidized by the state, the producers had to take personal risks to produce and sell, thus experiencing the adverse effects of the open-market system on a regular basis. To be a successful farmer one had to have the initial capital, social networks and open access to markets and consumers. In many of the cases all these factors depended on one's past experience and connections. In this section I discuss two cases of successful private farmers I observed in the village over a long period of time starting from 2004. Apart from Peter Zheliyazkov and Peter Tochev[45], five more families in the village had small private farms ranging between 20 and 50 cows in 2007.

[44] For a discussion on the basic living standard provided by the socialist state, see Chapter 1.
[45] These are the real names of the two farmers.

Peter Zheliyazkov

In the years following the liquidation of the state cooperative, individual private farming had become a successful realization for only a few of the rural dwellers. The biggest private farmer in Cherven was Peter Zheliyazkov. He specialized in animal husbandry. His private cow farm was the most successful big-scale private farming enterprise in the village. The farm specialized in the production of meat and milk; hence there were 110 diary cows and around 50 cows for meat. The enterprise had operated for approximately thirteen years.

I was curious to find out more about Peter's educational background. Peter had completed high school in Assenovgrad with a special training in metallurgy - connected to one of the big industries in the area. Later he attended specialized seminars for educating farmers organized by an American foundation. Within the same training program he had spent one month in the USA on experience exchange. At present Peter was studying agro-economics at the University of Stara Zagora. He lived in Assenovgrad together with his wife and their two children. The children eagerly participated in the business and wanted to continue the family farming tradition.

Peter's deceased grandparents were villagers from Cherven. They both worked in the socialist cooperative in animal husbandry. Peter's father married and lived with his wife and two children in Assenovgrad. Both parents worked in *Assenova krepost* [46] and earned well. Peter was raised in the town but often went to the village to visit his grandparents. He was interested in animal husbandry from an early age. Back then the family produced fruits and vegetables for the market. In this way they were able to make savings. Later this money helped Peter start his own business a few years before the changes of 1989. Then he bought sheep, calves and cows. He had only one employee at that time. During the disestablishment of the socialist cooperative in 1993, Peter went to liquidation auction and bought the old fully equipped barn and moved his animals there. That was the same barn where his grandparents used to work in. Next Peter bought the plots of land around the barn to complete his animal farm. From his family the farmer inherited around 30-40 dekar of land (for comparison the average landholding in the village was in the range between 10 and 30 dekar).

[46] *Assenova krepost* was a state enterprise specialized in production of plastic products. During socialism the enterprise was a major employer in Assenovgrad and its locality. After being privatized, *Assenova krepost* continued to operate with only a fraction of its previous capacities.

To my question, "*How do you find markets for the produce?*" Peter replied confidently "markets are available". As stated earlier, his firm had 3 barns containing 160 cows – 110 diary cows and 50 meat cows. In 2007 Peter produced around one ton of milk per day and he sold the produce to the big milk manufacturing enterprise "Serdika". Peter sold calves to a businessman in Plovdiv for export. In addition to his main farming activities he regularly did various services: cleaning the snow in the villages of Assenovgrad municipality, and working mechanically the land in the village cooperative.

During a visit to Cherven after my field work was officially done I heard that his business was so successful that in 2006 he started competing with the local cooperative and attracting villagers by offering higher rent. Indeed in the summer of 2006 Peter posted an advertisement in the village, declaring his offer to rent land directly from landowners in the village. In this case, he probably calculated that establishing a direct business relationship with landowners was better than having the cooperative as an intermediary. As a result by 2008 about 50% of the landowners in the village had preferred to deposit their land with Peter instead of giving it to the cooperative. The reason was Peter paid higher rents than the cooperative – 80 kg of grain per one dekar against 20 kg. The farmer had taken over land from the neighbouring villages as well. Ultimately he cultivated as much as 6000 dekar. He used this land to produce fodder for his animals and sold the surplus to local farmers.

When I went to interview Peter, I met his parents as well. They were residents of Assenovgrad but to this day cultivated their land in Cherven and produced fruits and vegetables for the market. They as well had around 4 - 5 dekar of vineyards. They sold the grapes to the local monopolist, *Vinprom Assenovgrad* (in 2007 price was set at 0.40 BGN/kg), after keeping a portion for domestic consumption and wine production.

During our conversation, Peter admitted he preferred to finance his business with his own funds and hence avoid taking loans. So far he had only used small government aid but had never applied for EU subsidies. Every profit he made was reinvested in the expanding business. Thus Peter planned opening a new barn for 200 cows in spring of 2009. He usually went to Germany to purchase new machines and other necessary items. So far Peter kept a small number of employees - 12 people from the village and the

neighbourhood. For now he had no plans to hire more workers. One family of ethnic Turks was working at the farm – Orhan and his elderly mother. In 2005 Orhan was a bachelor in his mid thirties. He had the reputation of a diligent and reliable worker. In fact Orhan was the most important man in the farm right after Peter. Orhan's contribution to the farm successful development was essential and thus he was treated with enormous credibility, trust and respect by the owner.

Peter Tochev

Another example of successful private farming in the village was set by Peter Tochev. While I was in the field (2004/2005) Peter had 30 diary cows and delivered milk to one of the biggest milk-producing companies "Fibella" in Bulgaria. He had started his diary business in 1994 and during the years had managed to sustain and enlarge the enterprise. In 2007 he expanded the cow farm, adding more animals, after winning an application for EU subsidies. Hence Peter managed to upgrade his cow farm ultimately accommodating 120 cows. For managing his business enterprise he mostly relied on his family – wife and two sons, employing only two hired workers to help in the farm. His elder son Marin was in fact responsible for the successful application to EU funds. Martin personally prepared and filed the application. After the funding was granted, he gave up his full time job as a financial broker in Plovdiv in order to devote his full attention to the expansion of the cow farm in Cherven. In addition to running a prosperous cow farm, Peter and his family had also established and supervised one of the successful hotel complexes in the village.[47]

As the two examples of successful private farming demonstrate agriculture could still be regarded as a sphere of professional realization, production and employment. Both farmers discussed in the section had plans for expanding their farms in the last years. They both managed their businesses with a limited number of employees, relying mostly on members of their family and a few trusted workers. Peter Zheliyazkov started his business and purchased his first cows with savings from his parents. He still very much relied on his family for managing and expanding his business. The success of the other farmer, Peter Tochev, had also depended on his effective family relations. Therefore both cases provide enough evidence to the relevance of kinship and family

[47] In the next chapter I closely discuss this aspect of the village economy - developing facilities and services in view of the expanding rural tourism in the region.

networks in providing practical help. As much as this sort of agro-business – animal husbandry and milk production - guaranteed employment and certain level of security for close family members, it surely did not offer any jobs to a large number of villagers. In this sense the two farmers did not create jobs for the village population at the scale experienced at the local cooperative during socialism.

There were also important differences in the way the two farmers created and managed their social and political capital. Apart from being a successful farmer, Peter Zheliyazkov had political aspirations as well. In the last municipal election in 2007 he ran for a member of the municipal council and got elected. His present position of authority he used to finance a community project for constructing a sewerage system in Cherven in the summer of 2009. Among other community projects Peter was involved with was a small shrine near the village – not long ago the farmer sponsored the repair work of the shrine. Unlike Peter Zheliyazkov, Peter Tochev did not have political ambitions of his own. Nevertheless he belonged to the politically prominent family clan *Tochevi* in Cherven. The present the Mayor and informant Stefan Tochev also originated from the same family known for its leadership and loyalty to communist values during socialism. Therefore Peter Tochev had direct access to political power through his family and kinship networks.[48]

In my analysis I define private farming as a *professional occupation* and differentiate it from household production. In the next section I look at household production as production taking place within the village household in the form of subsistence farming and in some cases - market-oriented farming.

The Dynamics of Household Composition and Production

Until the end of World War II agriculture was the basis of Bulgarian national economy (Ivanova 1997: 107). After land collectivisation, many of the former landowners left the countryside to seek employment in towns. During 1960s and 1970s the out-migration from rural to urban areas was one side effect of the accelerated industrialization in the country. Young rural residents who left farming behind were massively employed by the emerging state industries. It was estimated that after the

[48] In Chapter 7 I discuss aspects of local political influence and authority along kinship and family lines.

establishment of cooperative farms in Bulgarian villages, a large amount of labour force had been released (Znepolski: 2008: 202). In the period from 1957 to the end of 1960s a majority of rural population migrated to urban areas as in the course of 20-30 years the migrants exceeded 2.5 million people (Kolev 2002: 239). As a result of the socialist modernization project Bulgaria had been transformed from an agricultural country with three-quarters of rural population (75.3% in 1946) into the most industrialized east European country on par with Czechoslovakia with two-third of urban population (67% in 1988) (Chavdarova 2001: 157).

Under these new economic conditions, the classic patriarchal model of the family organisation - the multiple/compound household - was challenged.[49] The traditional pattern of household organisation in the past was the so called zadruga – a form of extended family which combined several important functions: guaranteeing a level of social security and protection, managing collective resources (e.g. land, labour), securing basic consumption needs, and facilitating family reproduction and childcare. The main cultural characteristics of this type of family organisation were: paternalism, traditionalism, collectivism, and egalitarianism (Kolev 2002: 101). This arrangement of priorities left little space for personal initiative, individual development and advancement: "In a familistic society, whether it is in the Balkans or China, life is largely customary and traditional. Individualism is discouraged because of the crisis that the unusual person creates in the daily routine"(Sanders 1949: 144).

Thus the traditional roles of each one of the members of the extended family were reproduced from generation to generation with little added changes. The economic and security functions of the zadruga (including the controlled access to collective resources) were indispensable to group survival of the Bulgarian nation under the Ottoman rule (1451- 1878). However poverty and lack of viable economic alternatives perpetuated the functions and basic attributes of the zadruga as far as the 19th century (Kolev 2002: 99-111).

As seen from the above quote, Sanders (1949) also acknowledged the importance of collective family life in Bulgarian villages. Furthermore he outlined the reasons that led

[49] Traditional models of Bulgarian household and family patterns were discussed by Geshov (1887), Hadzhijski (1966) and Todorova (1993).

to the dissolution of the zadruga – western cultural influences (e.g. the French revolution, individualization and modernization aspects), land fragmentation, internal frictions associated with challenging the established authority of the elders, possibilities for greater social mobility, and education (ibid: 65-67). All these factors contributed to the gradual modifying and eventual obliterating of the traditional *familistic* way of life. These changes were however enormously accelerated with the advancement of the socialist project of modernization.

According to periodic statistical surveys of household composition the average Bulgarian household consisted of 4 people in 1950s. In 1965 and 1975 this figure changed to 3.60 and 3.37 respectively. In 1985 households had 3.22 members on average compared to 2.94 in 1989.[50] The general tendency concerning household structure according to the number of members is pointing to an increase in the two- and one-member households. Creed (1998: 39-40) as well noticed the "increase in household fission" for his particular field site - the village Zamfirovo. He claimed that this tendency dated back to the 19th century referencing Mosely (1940) and Zhivkova (1993: 141-43). The dissolution of extended families had led to land fragmentation in the short run (Creed 1998: 40) and various family survival strategies based on differentiated economic activities in the long run. In this section I am concerned with household activities relating to farming. My intention is to describe and offer interpretation of the types of farming (subsistence and market-oriented) I had observed in the village. As I have already stated in Chapter 1 my unit of observation was the single village household, consequently my examples present farming activities performed within the village households.[51]

Households in Cherven varied in composition. It was habitual to see pensioners' households, households of widowers, as well as three or even four generation households – grandparents, parents, children, and grandchildren. Hence there is a wide range of household arrangements in Cherven. In any case I could make the following estimation of the 12 observed households in the sample of the HBS (2004/2005): in the sample of these 12 households there were five 2-member households (e.g. couples of pensioners), three 3-member households (e.g. nuclear families), two 1-member

[50] The data presented are from regular surveys of the National Statistical Institute (http://www.nsi.bg/).
[51] For a discussion on "household", see the methodology section in Chapter 1.

households of widowers, and two 5-member households (multigenerational). From this selection of 12 households the prevailing type of household was the 2-member household. The majority of these 2-member households were couples of pensioners. Having in mind the aging population of the village this household composition was not at all surprising. On the following pages I give an example of two pensioners' households I encountered. I gradually came to know these pensioners through prolonged contact with them during a number of visits over the duration of the survey. Each sampled household was observed for one year. The main benefit of this long-term contact for my research was that I was able to record details of their daily life including farming activities, and relations with children residing in urban areas.

As early as 1973 a government decree No. 61 allowed for around 540 000 dekar of land to be allocated to private cultivation. At the same time roughly 5300 supplementary farms serviced industries around the country (Kolev 2002: 172). Intended to remedy certain drawbacks in the socialist economic system of shortage (Kornai 1981) this measure had shifted the responsibility of ensuring the basic supplies and consumption from the state to the private households. In addition this particular state policy had once again restructured social and family relations by provoking social differentiation as much as intensive interaction between rural and urban residents. People able to cultivate their land plots felt a considerable improvement in their living standards as their consumption and personal wealth increased. Consequently urban dwellers regularly visited and maintained close relationship with their village relatives in order to help and claim part of the produce. In such a way at the beginning of the 1980s 55% of the population above the age of 16 was employed in subsistence farming (Tzachevski 1991: 291). Consequently this sector was responsible for 40% of meat, 28% of milk, 55% of eggs, 35 % of vegetables and 36% of fruits produced in the country; over one third of this produce was purchased by the sate and one third of the incomes of rural population were generated in private farming (ibid). Subsistence farming had retained its importance as an incorporated aspect of the household economy even after the changes and the following political and economic restructuring (Kolev 2002: 167-176). Furthermore Chavdarova (2001: 158) noted that in no other country of those belonging to the former socialist block, with the exception of Romania, was subsistence farming as popular as in Bulgaria. This tendency was owing to the long tradition in "natural economy" reinforced by corresponding state policies during socialism. In the

postsocialist period the "natural economy" persisted in view of the limited purchasing power of the Bulgarians and massive unemployment in the state sector (ibid: 197).

In Cherven households were as well granted plots and vineyards for private cultivation during socialism. According to informant Stefan Tochev, then the average household in the village had ½ dekar of vineyards and 150 sq m plot for private cultivation of fruits and vegetables. In addition each household had used 2 dekar of the communal land for producing fodder fed to cows, and other domestic animals. In this way villagers were able to engage in subsistence farming and satisfy their basic consumption needs. Then the cooperative machinery was used to service villagers cultivating their land plots. Now similar services were done with the equipment belonging to one of the private farmers discussed in the previous section - Peter Zheliyazkov.

At present most of the families in the village were partly employed in small scale household farms consisting of limited dekar of land (in the range of 5 to 10 dekar on average) and a small number of domestic animals – cows, lambs, pigs, hens, etc. According to official regulations, the Mayor contended, villagers with less than 5 dekar of land were categorized as *maloimotni* (translated as "having petty property"). Around 18 – 20% of the villagers in Cherven were *maloimotni* – people with petty property or no property at all who had the right to cultivate municipal land at a minimal rent set by the respective municipality (in the case of Assenovgrad municipality the rents were determined according to the category and function of the land: arable land for 12 BGN/month, vineyards – 12 BGN/month, pastures – 3 BGN/month). According to the Mayor's estimations, in 2005 there were 60 people in the village who used this option. These were mainly newcomers from the neighbouring villages and towns.

Stefan explained that currently 10 – 12 families still cultivated their land plots privately not relying on the cooperative. In general only four or five families produced fruits or vegetables for the market on annual basis. I personally witnessed one household producing red tomato for sale in a green house in their garden. In fact their tomato was among the few crops spared by the hailstorm in July 2005 only because it was well preserved in the green house. Most families in the village still cultivated their gardens and preserved food – canned meat, fruits and vegetables. However, in the last years there were only a few domestic animals left in the village households: cow, pigs, hens,

etc. As the fodder fed to animals was getting more expensive, it had become more convenient to purchase the meat and milk at the market.

Martin and Nikolina (a couple of pensioners both native to the village) provided a specific example of a household economy. Their two children had left home to continue their studies and finally ended up living in the major city in the region - Plovdiv. The daughter was 39 years old, recently married, a restoration specialist in the Archaeological museum in Plovdiv. She painted Orthodox icons and some of these icons decorated the walls of her parents' living room. Some time ago she had worked on a project (sponsored by some Italians) about teaching restoration skills to children. The son was divorced, but his parents had kept very good relationship with their ex daughter-in-law (e.g. they exchanged birthday presents). He had graduated with economics major and at that time was working as a credit consultant in the region of Plovdiv. The son and daughter would regularly bring their parents goods from the city METRO supermarket. The parents always paid for the goods brought by them.

Martin had worked as a bookkeeper in the local cooperative and had been later transferred to the agro-complex in Assenovgrad. I had already cited his opinion in relation to cooperative restructuring. His wife Nikolina was born in 1942 and had primary education. They lived in a big house (96 sq m) surrounded by a garden. In their spacious garden they regularly cultivated tomatoes and potatoes for personal consumption (subsistence farming). They had in total 7 dekar of land (some land was given to the local cooperative) and cultivated 1.5 dekar of vineyards. Additionally they had rented 4.6 dekar of vineyards to cultivate (market-oriented farming). Thus Nikolina and Martin privately cultivated approx. 6 dekar of vineyards and their children came from Plovdiv to help their parents during the peak season - the picking of the grapes.

I soon discovered that Martin was a devoted beekeeper – he looked after 40 bee hives that yielded 60 kg of honey on average. In 2005 he had 100 kg of honey and confessed that each year less and less honey was produced. The honey was consumed by the members of the family and the surplus was sold to a number of regular customers. There were no animals around the house. The couple's preserved food included cabbage, pees, beans, winter salad, home-made fruit juices, and some canned vegetables: cucumbers, peppers, tomatoes, etc. The home-made produce benefited the

children in Plovdiv who consumed the canned food preserved by their parents. As I was about to discover this was a common practice in the village that strengthen kinship ties between rural and urban branches of the family.

Nikolina told me that wheat crop was damaged by bad weather conditions and the bakeries did not want to take wheat in exchange for bread coupons. They personally purchased grain (0.15 – 0.20 BGN/kg). So they had given it to the local groceries in exchange for bread coupons. For 100 kg grain they had gotten 100 – 105 bread coupons. The benefits of this transaction were that in the course of one year they could buy their bread at a discount. Nikolina explained that in this way the family budget had been rationalized: the money saved during the summer was invested in grain far in advance and in this way bread was less expensive during the winter season (so that extra money could be allocated to other expenses, heating for example). Since bread was so important in the daily meal of the villagers in Cherven, there was no wonder that most of them guaranteed their weekly allowances far in advance. Many households exchanged wheat for coupons at the local grocery shops. As a result the competition among the groceries was intense as each of the three available in the village attracted loyal clients who besides bread would regularly buy other commodities as well.

Another example of a typical pensioners' household were Konstantin and his wife, Marta. I met them during my unofficial involvement with the HBS at the end of 2004. They were one of the four pensioners' households I got in touch with. Konstantin and Marta lived in an ordinary village house with a spacious garden – a very typical housing arrangement in the village. Marta was a pensioner, retired not long time ago from a kindergarten in Assenovgrad with a pension of 85 BGN. She had worked in the kindergarten for 3 years. Before she had worked for one big socialist enterprise *Balkancar* as a typist for about 20 years and had earned very well. Konstantin had been out of work since New Year 2005. After he was fired with no explanation he started looking for employment in the local labour bureau. The villager had found job as a turner but was not hired because he happened to be too old (the employers were looking for people under 30). Now both husband and wife contemplated staying home and taking up intensive farming (husbandry and gardening, land cultivation as well) in order to make ends meet. I think the main reason behind this decision was that the monetary

incomes they both received (their pensions) were not enough to meet their basic necessities – especially covering their expenses for electricity, heating, and medicines.

During our conversations Konstantin shared details on his farming activities: in 2004 he had produced 820 kg of grapes in total, he sold 540 kg of this amount at 0.5 BGN/kg (270 BGN) (market-oriented faming). The remaining 280 kg were used for making 80 litres of wine for domestic consumption. From his garden he had collected 25-26 kg quinces and had conserved them in 48 jars. He had given around 291 kg wheat to the local grocery shop in exchange for bread coupons. His family had bought one calf for 30 BGN and fed it on artificial milk. In addition they had 5 sheep and 3 lambs. He had 15 eggs from one hen. His 4 hens and 7 chickens did not lay eggs when the weather was too cold.

Konstantin had 25 dekar of land (1. 5 dekar of this land consisted of vineyards) and his brother had additional 50 dekar of land.[52] The two brothers did not deposit the land in the local cooperative but worked it together with their tractor. However the tractor's maintenance was getting too expensive, Konstantin complained. They grew wheat, corn (1, 5 tons), sunflower (800 kg) for fodder, and also beans, potatoes, melons and watermelons. All that produce - a result of carefully planned and executed subsistence farming - was consumed by the families of the two brothers and nothing was sold to the local markets. So it was another example of how family worked together (kinship solidarity) to produce food which would be later redistributed among the members of the kinship/family group (children and grandchildren residing in the urban areas). His two children did not help him in farming. They resided in the urban areas and worked there for years. Nevertheless they relied on their parents for food supply – another instance of subsistence farming and its implications for the functioning of *kinship networks* – production and redistribution.[53]

These examples drawn from household observation pointed to common and distinct features of the two pensioners' households. They shared similar characteristics: both were composed of pensioners' couple residing permanently in the village; their children were urbanites who had kept regular contact with their parents, benefiting from the flow

[52] Konstantin originated from a wealthy family. In the pre-socialist times it was among the three families in the village to have as much as 100 dekar of land.
[53] For a discussion on "kinship network", see Chapter 2.

of resources (food in the first place) and exchange of favours. In the first case (Martin and Nikolina) children occasionally helped in farming in opposite to the second case (Konstantin and Marta) where children did not. Both households engaged in subsistence and market-oriented farming to supplement their monetary incomes and reduce their food-related expenses: obtaining bread coupons was common as was the cultivation of vineyards (profit-oriented activity). In addition Martin was a beekeeper and profited from this activity. In contrast Konstantin had animals for domestic consumption only. And while Martin had only a few dekar of land (some of it in the cooperative); Konstantin had much more land and worked it privately with his brother.

A major theme in these household descriptions appears to be the resource flow within kinship networks: people who had kept ties with their relatives in the villages were able to benefit from exchanges of resources – food and labour in the first place. Maintaining relations between urban and rural kin was one survival strategy determining the phenomenon, identified by the Canadian anthropologist E. Smollett (1989) as *economy of jars* - that is private production and preservation of food in rural households and its subsequent distribution among close members of the kinship group. Bulgarian sociologists (Tilkidzhiev 1998; Kelian 1998; Rajchev 2004) have also confirmed that kinship networks (urban-rural) and solidarity in exchanging food and services became part of the life strategies of many families. Dating back from the socialist years, the reliance on household production was strengthened after 1989 (Kolev 2002: 171).

Another important theme standing out in the two examples is related to distinguished consumption patterns. Here I need to explain a basic specificity of food consumption in rural households. Maya Kelian (1998) discussed the results of statistical surveys that pointed to a general shrinking of household consumption, and an increase in food expenditure at the beginning of 1990s of all Bulgarian households (urban and rural). For example in 1994 food expenditures of Bulgarian households had reached 45% of total household expenditures. The international criteria accepted to determine the social minimum of existence indicated that households having food expenditures above 40% were considered to be living under the social minimum (ibid: 172).[54] Although I could not cite relevant information for the village I could infer that food consumption was still

[54] Sources cited in Keliyan (1998: p. 177): *Household budgets in Bulgaria (1991)*, NSI publication, Sofia, p. 22; *Household budgets in Bulgaria (1992)*, NSI publication, Sofia, p. 29; *Household budgets in Bulgaria 1994 (1995)*, NSI publication, Sofia, p. 7; *Statistical yearbook (1995)*, NSI publication, Sofia, p. 71

among the critical issues of household existence. Otherwise the extreme efforts and expenses directed at producing, preserving, and sharing food among close relatives could not make sense in the context of sufficient market food supply. A woman in Cherven explained the endurance of subsistence farming in the following way: "Our produce could turn out to be more expensive than food sold on the market, but this is what we are used to doing." In other words producing food might be more expensive than simply going and buying it on the market, nevertheless it was done because of the established tradition or the cultural mode of doing things. Insufficient monetary incomes could also help explain the staying power of subsistence farming in rural areas: small pensions do not allow people to buy enough food at the market; hence they are compelled to produce food in their household economy.

In the analysis of household production I will also explore the case of my host family. I have already introduced the family members in the introduction, so I proceed to the case in point. I need to specify that household production in Cherven (subsistence and market-oriented) was usually carried out as secondary and supplementary work in combination with employment in the state or more often, in the private sector. In such a way families diversified their sources of income and contributed to the development of a specific "peasant" lifestyle and consumption culture.

One of the generally accepted purposes of family based farming was to guarantee a minimum level of subsistence. It was usually organized around the household and run by the family or the larger group of relatives. Kinship networks structured household duties and reciprocal exchanges of labour and services exactly the same way they did in the past:

> "Then, too, earning their living by farming was a joint enterprise. People got used to putting their shoulders to the wheel as a family group. In addition to what they all did together, women were supposed to do certain things, men other things, and children still other things. As long as every person did his part there was no friction, but quiet efficiency" (Sanders 1949: 101-102).

The extended family of my hosts produced onion, pepper, tomatoes, and cabbage. In addition they stored canned meat, vegetable and fruit jars. Their production was taking place in the back yard of the family estate where the grandmother was often seen

attending to the crops: parsley, peppers, tomatoes, onion, etc. This produce was shared between the individual households of Iliya and his elder brother Dancho. Dancho lived in a separate house on the same plot of land with his wife and the family of his daughter. Behind Iliya's house there were also sheds for domestic animals. In 2005 the family took care of three cows, five calves, six lambs, ten hens, four bulls, chickens, and several wild ducks. To feed these animals they bought fodder on the local market. According to one villager around 70% of the villagers bought the fodder necessary for their domestic animals. According to his explanation these people were not able to produce it themselves because they were not landowners or had tiny plots of land as a consequence of land fragmentation. In addition buying fodder eliminated risks associated with production (e.g. unfavourable weather conditions).

In this context it is important to note how villagers including my hosts dealt with the rent from the local cooperative. For example, in 2004 the father of my hostess Stefan had deposited 34 dekar of land in the cooperative. For his contribution he was entitled to 20 kg of wheat per 1 dekar. On behalf of his family he handed 800 kg of wheat to one of the grocery shops in the village. In return he was given 900 coupons for bread. These coupons would allow him to purchase the bread at a discount rate of 0.25 BGN instead of the normal price of 0.55 BGN. The rationale behind this practice was that villagers were able to pay for bread "in instalments". Having in mind that the monetary incomes of the majority of village pensioners were dramatically reduced in the recent years (the average pension for former agricultural workers was approx. 150 to 200 BGN) this strategy was useful in reducing the money spent on food. I have already discussed the rationale behind this household practice in the context of the two other examples of pensioners' households.

Subsistence farming was only one aspect of the household economy. In 2005 market-oriented farming often complemented all other subsistence farming activities as usually the surplus was traded on the local markets or crops were intentionally cultivated to be later sold for profit as was the case with vineyards in the village. During my year of field research at the village my hostess Rossi was for most of the time a housewife. But besides her occupation with family matters, Rossi worked part time for a diary farm located at a nearby village. Her job was to collect the surplus of milk from villagers on a daily basis. She would get up very early in the morning, villagers would come to her

house and their milk would be tested and stored in a special truck. For her job she received a minimal wage of 150 BGN.

When she had first started collecting milk back in 1992 – 1993, she used to collect 1800 litres each morning. During these years, milk price had been favourable for producers and many families in the village had accumulated considerable incomes. Rossi and her husband then had been able to expand their house because of the profits they had generated from milk. In contrast in 2005 she collected only 200 litres. Nowadays, she explained that the milk price was decreasing which made keeping cows extremely difficult for milk producers in the village. Hence villagers had kept fewer cows than before because of the high expenses associated with it. Normally only about 15 villagers would produce milk for their households and the surplus they would bring every morning to Rossi.

Despite unfavourable conditions, Rossi's household economy still continued to produce and deliver milk every morning. They had five cows and usually milked them three times a day. This obligation was shared between Mitko (the elder son) and his parental grandmother, baba Tinka[55]. When I asked him about his involvement with the cows, Mitko told me how much he loved taking care of animals. His desire to study veterinary medicine was blocked by his high school unsatisfactory diploma. As a consequence his low grades restricted his access to the vet school. Nevertheless, his commitment to the cows endured despite the occasional jokes of his friends in the village. In October 2005 he completed a course on artificial fertilization of cows and obtained a special certificate.

Mitko told me that a cow could consume as much as 80 litres of food and water daily and according to its breed could give from 10 up to 30 litres of milk per day. After the sale of the milk, Mitko received 160 BGN as a salary for his contribution to the household. I asked Rossi if her son Mitko would be interested in becoming a farmer. "Why not", she replied, "if the perspectives are good." Yes, Mitko would work in agriculture, if he had the opportunity to earn good income. "We want to earn good

[55] Baba Tinka, despite her old age (74) and health problems was a wage worker in farming during the summer of 2005.

profits from our work," said Rossi, obviously implying that the state should do its part of the job that is, creating the favourable conditions.

As farming was reduced in scale and significance in the village, the time family members spent on related activities respectively declined. As a result children were not as heavily engaged in family farming activities as before. Sanders (1949: 114-115) also confirmed the important contribution of children in the pre-socialist village:

> "As the children grew older, however, they became important as economic assets. They could do hard work; they could run countless errands. Later, they were the heirs to the father's fields and the chief support of the parents in their declining years."

My hostess Rossi recalled how much she used to work in her childhood years. Then children from the neighbourhood would get together to sit on the street and process tobacco during the day. Her children were not so engaged in agriculture although still contributed to the household economy as the example with Mitko showed. Occasionally children under eighteen often helped their parents, collecting and processing crops or selling the surplus in the local marketplace. I observed how some of them would spend day after day in the village central square or along the road, trying to sell tomatoes, water melons, etc. Nevertheless I witnessed another type of children's participation in family business this time related to the growing tourist industry in the village. In this way the familial involvement of children in the development of village economy persisted even after farming was no longer the major source of employment.

Commenting on her early involvement in family farming, Rossi remembered how hard she laboured milking cows when she was 23 years old, a mother of two little children. At that time her family delivered 100 litres daily to a diary farm. Meanwhile they were reconstructing the family house. Suddenly the diary farm stopped paying them. The construction workers working on their house had to receive their wages by all means. So her husband Iliya went to the cooperative and purchased five tons of red pepper. Then he went to the market place in Sofia. For 3-4 days he earned about 800 BGN and in this way the family survived the financial crisis. From this case they drew a conclusion - being a middleman was more profitable than being a producer due to the

high risk and hard labour associated. At the same time access to vital resources was determined on maintaining good relations with the local cooperative during socialism.

Today, deprived of the resources once accessed through the socialist cooperative system, the household producers went into bankruptcy. Therefore as tendency indicated only big-scale farmers could survive on the market. In 2005 Rossi claimed that very soon diary firms would not buy milk from household producers due to increased quality standards of production. This prediction became a reality with the Bulgarian entry into the European Union in January 2007. In this way the small scale household farming was gradually liquidated. Initiating a big scale farming enterprise required a lot of available capital. That is why Rossi considered it was too late to think of becoming big scale farmers. There were examples in the village of successful big scale independent farming but the two farmers (Peter Zheliyazkov and Peter Tochev discussed previously in the chapter) had made an early start and established their farms over a long period of time. Hence I had the impression that becoming an independent farmer was more easily accomplished during the first years after the changes. At present, the investments required far exceeded the ability of a modest family budget even when combined with a credit loan.

At various periods of my hosts' marriage different activities related to family farming took precedence - raising silkworms, growing tobacco, the most recent and lasting was the cultivation of vineyards, reflecting the tradition of viticulture in the region. As I have previously shown vineyard cultivation was a traditional farming practice in the region. For some years vineyards were a considerable source of wealth for village households enabling them to generate substantial monetary income. In 2005, for example, the family of my hosts produced 1.5 tons of grapes out of 2 dekar. Their revenues amounted to 1125 BGN. Following the general practice in the village, Rossi's father Stefan had also cultivated 10 dekar of vineyards. The amount he produced was 6 tons of grapes. Because he rented the plot, he had agreed to share in half the revenues and expenditures with the owner. The annual revenue from the selling of grapes was 4000 BGN and the total expenditures amounted to 1200 BGN. As a result after selling the grapes to the local monopolist his personal share of the profit was 1400 BGN. This was a considerable profit for a village household where the average pensions ranged between 150 and 200 BGN. Nevertheless household producers invariably faced

problems with finding markets for their products and getting the satisfactory purchase price which had remained one big obstacle before the expansion of the vineyard cultivation as well. After a heavy rainfall in combination with a hailstorm on one hot July morning in 2005 many crops were damaged, including the vineyards – a source of additional income on which many families in the village relied. Nonetheless the yield in 2005 was 900 kg of grapes per one dekar – a substantial increase from last year - 300 kg. As a result of the heavy rainfalls throughout the year, the grapes were filled with water which explains their increased weight. The lack of sunlight, however, had a negative effect on the quality of grapes. The level of sugar in the grapes was very low – 18-19 degrees in comparison to the normal standard of 21 degree. Consequently the wine producer had to compensate for the low sugar by using additives to stabilize the wine.

According to an established annual tradition in 2005 the organized purchase of the grapes tool place from 8 till 11 of October. *Vinprom Assenovgrad* – the major wine-producing industry in the region – was the monopolist buyer. Villagers often complained about the arrangement when the monopolist dictated the prices of grape each year. The initial price was set at 0.90 BGN per one kilo of grape and during the bargaining gradually dropped to 0.75 BGN. The sort of grape cultivated in the village was Cabernet Merlot suitable only for wine production. According to different informants the village had produced between 100 and 200 tons of grapes this year. Usually villagers preserved approx. 200 kg for household production of wine.

The income villagers obtained from market-oriented farming were usually reinvested in improving housing conditions. Hence, Rossi and Iliya's family estate was periodically expanded and renovated to meet the needs for social security of its occupants. Thus instead of investing in proliferation of farming activities, the family preferred to invest in "areas of future benefit to offspring such as housing, rather than the farm business" (Small 2005: 495). Close relatives of Rossi and Iliya, also followed the same strategy of investing all their incomes from market-oriented farming in acquiring and renovating real estate in the village. That was the case with Rossi's brother and his wife who had bought one house in the village and had started modernizing it at different stages during official work vacations. Dancheto, Rossi's sister-in-law, explicitly explained to me that having to provide for their two sons prompted this decision – they wanted to leave to

each of them one house as a property. In general the care for successors prompted and explained many of the household renovation projects and other family ventures in the village. People who failed to provide for their children were the exception, not the rule.[56]

Ann-Lee Small (2005) writes about the influence of "family" on independent farming. Her research, carried out in multiple sites in Bulgaria and Southern Russia, identifies several key factors related to family farming: accessing resources (land, labour, capital) within kinship networks (ibid: 495); transferring the family farm to successive generations through kinship ties (ibid: 491); allocating investments in preferential spheres (ibid: 495). Small (ibid: 490) argues that familial basis of farming was one distinctive feature of the Soviet regime:

> "During the Soviet period, extensive, family-based networks of informal exchange and support became a significant coping mechanism, circumventing bureaucracy and operating below the levels of government scrutiny. Extended family relations took on an economic role arguably beyond that of most Western societies."

Similarly Maya Kelian (1998: 166) highlights the economic importance of family relations in farming in her sociological analysis on social stratification in the present-day Bulgarian village. Therefore labour accessed through kinship networks was a valuable resource as much as access of land was determined by inheritance within the family. During my stay I was able to observe a similar case of reciprocal exchange of labour and service within a kinship network. These exchange practices were most obvious during harvest and processing of crops. Then close relatives would help each other and much interaction was going on in close kinship circles and compound households as the example of my hosts illustrates. Access to land was also determined by inheritance within the family. In this way Iliya and his brother Dancho had inherited 16 dekar of land from both parents: 8 dekar from their father and 8 dekar from their mother. (I could further explain that their mother had received approximately 10 dekar of land from her parents as much as her two other sisters.)

[56] The renovation project of my hosts' house I describe in Chapter 6 on social security. In general all farming activities and subsequent investments were aimed at minimizing risks and maximizing security for all members of the family and kinship group. Inheritance and property I regard as aspects of kinship based social security.

Assessing the Reforms: Exclusion from the Land

Understandably there was a gradual transition taking place in Cherven. Obviously farming had ceased to be the dominant model of professional occupation in the last decades of economic development. The majority of village residents were discouraged in pursuing market-oriented farming as a full time or part time occupation by the low purchasing prices, rising production costs and competition from abroad. On the other hand, nostalgia about the past was sensed in every conversation I had with informants on the topic of agriculture. It was obvious that my informants – Stefan, Nenka, the Mayor and my hostess Rossi – were regretting the present state of affairs. From our discussions I understood that the village economy was centred on agriculture during socialism. Stefan and Nenka were among the leading local actors establishing the foundations of the socialist modern cooperative farm during 1950s and 1960s. Their disappointment was justified in view of the efforts they had invested in making the cooperative farming in Cherven so successful in the past. Nevertheless villagers who were common workers also expressed their frustration provoked by the end of the cooperative farming and the security it provided for the village community as a whole and each individual household.

According to informants the liquidation of the collective farm in the village was a huge mistake. They nostalgically recalled the model cow farm in the village. The farm was fully equipped with modern technology for milking and processing. During the liquidation the cows were sold at minimal prices and later slaughtered by the local Gypsies. Often the memory of this event was evoked and shared to demonstrate the absurdities of the agricultural reform after 1989. However painful the process of decollectivisation was, villagers did not protest against it publicly.

A very similar episode of cooperative liquidation was depicted by one Bulgarian ethnologist – Radost Ivanova (1995, 1997). In 1992 Ivanova happened to be present at the moment when a cooperative cow farm in Panaretovo (a village in southern Bulgaria) was being liquidated and the cows were given over to villagers. She then recorded on the spot the reactions of the villagers. One of her informants – a representative of a once wealthy family – expressed his discontent over the current developments:

> "I think there couldn't exist anything stupider than this. People cannot understand that they must preserve everything. The former system didn't do much good, but whatever it built up should be kept intact so that the new private owner can reap his harvest" (Ivanova 1995: 221).

The same informant shared more of his thoughts in relation to cow distribution among the villagers:

> "They should have given them to those who used to be owners, that is, who gave their animals away (i.e. the animals given to the collective farms at their formation) and who will take care of them and will produce milk and meat… Now most of the people who are taking the animals away, especially those communists who established the collective farms, are just grabbing them to give them to the gypsies who will take them directly to the slaughter house. Next year we won't have either milk or meat, as they will annihilate private property…just staging a boycott. For me this is a simple boycott. To take the cows away and get them slaughtered. This should be restricted. The females especially should not be given away under any circumstances" (ibid).

In a similar manner the informants in Cherven spoke of decollectivisation as a wrong policy. Stefan felt nostalgic about the old socialist times when in the period 1980-1985 the local cooperative farm processed approximately 100 tons of vegetables daily. The production was exported in two directions: first, to the countries of the former socialist block; second, to west European countries. He also remembered how the village cooperative cultivated 3000 dekar of vineyards and 1000-1500 dekar of tobacco. All of this was now a memory of a more secured and predictable social environment.

The profile of crops grown in the village had changed drastically in the recent years. In the past, the production of tobacco, vegetables, fruits and grapes were distributed in Sofia and other towns. Villagers were continually employed and worked hard each year from February until November to satisfy internal and external demand. In contrast, in the period of 2004-2005 the new cooperative had planted only fodder crops. Villagers were employed only part-time during the year.

Therefore, the agricultural reform – liquidation and decollectivisation of collective farming - was inefficient (Chavdarova 2001: 197-198). The outcome was fragmentation of land and then returning small plots to their owners as ideal parts. Such organisation of land property was not efficient because the land was not accumulated in one big plot any more and had to be worked in small pieces. One of the problematic issues related to agriculture was the insufficient infrastructural and technological innovations and investments. When the land was returned to its owners, broken up into little plots, the use of modern machines was very expensive and inefficient. Hence, Bulgaria had demolished its modernized agriculture and farming was again brought back to its pre-industrial level of development. In the present situation, farmers have to work their land exactly the way their forefathers did – relying on domesticated animals.

The Mayor complained that there was no state policy and plan of action with respect to agricultural development in Bulgaria. In his opinion, land farming and animal husbandry had been totally destroyed during decollectivisation. He claimed that the northern parts of Bulgaria suffered worst than the southern parts, where Cherven is located. In the past, he claimed, many agricultural institutes used to operate in the region of Plovdiv. Now most of them were closed down and the remaining institutes functioned by only a fraction of their previous capacities.

As a result of land fragmentation financing agricultural production has become more expansive for the individual farmer - a situation which put him at a disadvantaged position in relation to the market of agricultural products. In fact his production costs far out weighted the revenues he got from his products at the market. The agricultural production was priced very low in respect to the time, effort and resources he had used for producing it. Private farmers were not compensated by the state for their losses. In addition to incurring exceptional production costs, he had to bear the risks of not finding enough clients for his products or experiencing the adverse effects of natural disasters, spoiling the crops. In this last case farmers in Cherven did not have any insurance to compensate for damages.[57]

[57] The year 2005 was an exceptionally bad year for agricultural producers in Bulgaria. Due to the heavy rainfall, there were devastating floods all across the country. According to a report delivered at Bulgarian parliament the total losses in the sector amounted to 70 million BGN, over 1 million dekar of arable land were flooded and 680 dekar – totally damaged. Luckily for Cherven inhabitants, their village was situated away from rivers and dams. There was, however, a devastating hailstorm in the area lasting less than an hour. As a result of the hailstorm in Cherven on 11th of July 2005, 50% of the grape crops were damaged. In this way

Through conversations with villagers about private farming I became aware of the problems some farmers could experience in starting their private businesses. Here I offer a summary of these problematic areas: limited access to initial capital; risky investment; labour-intensive; a low return on investment[58]; dependable on market forces of demand/supply; threatened by imports of cheap production; dependable of weather conditions; lack of state support/compensations; high quality standards (EU regulations).[59] The combination of all these factors made farming unattractive for small scale farmers and household producers who wished to expand their farms. Under these conditions farming was possible only on a large-scale basis. Notably in Cherven the two most successful private farmers who enjoyed most benefits in present had made an early start when some of the above restrictions did not exist. Nevertheless the main problem was securing markets for the produce and being able to reinvest part of the profits in expanding the enterprise and introducing the quality standards required by the European Union. In this context the generalized outlook of villagers was summarized in the opinion of the local vet doctor: there was no future for small-scale farming, especially after our entry into the EU. The costs and risks associated with farming were so high that only a big farm could sustain them. During a casual conversation the vet doctor told me about his vision of agricultural development in Cherven: all the land in the village (approx. 8 000 dekar) would be probably divided among two big independent farmers and the rest of the villagers would be employed by them.

Thus, the tendency in private farming was to accumulate land, labour and capital resources and have subsequent economies of scale. Ultimately private big-scale farmers appeared to be the winners as far as they managed to accumulate resources. On the

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many villagers were practically deprived of this valuable source of income coming into their households. My hosts, for example, expected yield of 3 to 4 tons of grapes this autumn. They had estimated their future income to be around 2 000 BGN. Many other crops grown in villagers' gardens (corn, wheat, tomatoes, etc.) were as well damaged. Villagers were quite struck from the great losses but in comparison to other parts of the county, theirs was a minor discomfort in terms of both property and personal safety. On the day after the hailstorm, a regional commission from Plovdiv came to the village to assess the damage. The Mayor who accompanied the commission later told me that the damage was estimated at 42 000 – 43 000 BGN. The local cooperative had only a cheap insurance to cover the losses of wheat crop assessed at 60%. Corns, tomatoes and vineyards were damaged at 30% (750 dekar) by the hailstorm, according to the Mayor.

[58] For example the return from 2 dekar of cultivated peppers was 117 BGN. This return, my informant told me was not enough to cover even the gasoline expenses, implying that he accessed his private plot by car. Another example pointed to 1000 BGN return for 10 tons of cabbage in November 2004.

[59] These were the general issues reflected all over the country. According to a representative survey, carried out in 1993 in Bulgaria, 12.3% of all interviewed farmers did not want to work in private farming in the future (Kapitanski 1994: 7). Among these farmers, 30 % declared that their negative attitude was due to the unfavourable economic conditions. Inadequate state regulation and procedure was the reason stated by 24% of them. Among other explanations pointed to were financial difficulties and underdeveloped market structure.

other hand, the evidence from Cherven shows that the local cooperative and majority of household producers are definitely at disadvantage for the same reasons of not being able to gather assets and sustain the big costs of farming under the present economic conditions. Hence the current phenomenon identified as "*exclusion from the land"* affected mostly the cooperative faming and household production in Cherven and was not that consequential for the big-scale private farmers presented in the chapter.

Obviously many villagers lamented the loss of agriculture and "*exclusion from the land"* – an expression I am using to signify the deep process of agricultural decline in the countryside. The agricultural sector in Bulgaria was shrinking after the collapse of the socialist economic support system and the subsequent loss of the Soviet markets. Today, low profitability and limited investments impact labour productivity in the sector, constituting merely 7, 7% of the GNP in 2005. Imports of cheap products additionally render local farmers unable to compete in the local markets. The lack of state support for private farming had induced high personal risks. The combination of all these factors had determined the present trend I am referring to as the exclusion from the land. This phrase also signifies the subsequent alienation from agricultural occupations affecting the rural population and this trend was strikingly obvious with villagers from the younger generations. Radost Ivanova (1997: 121) contends that the process of alienation of villagers from their land started with the establishment of the first socialist cooperatives. Then the boundaries of private land properties were blurred and so was the connection the Bulgarian villager had to land ownership and private property. Subsequently after the forced urbanization and collectivized farming during socialism, the decollectivisation of land after 1989 further contributed to this estrangement and ultimately widened the urban-rural gap by causing the second wave of massive out-migration from the villages.[60]

Gerald Creed (1998) formulated a similar idea which he termed as *"disengagement from the land"* in the introduction to his book *Domesticating revolution: from socialist reform to ambivalent transition in a Bulgarian village.* He enumerated the consequences of this process during socialism, starting with "…rural out-migration, daily commuting to urban workplaces, and the subsequent industrial development of the

[60] After 1989 massive unemployment in villages and small towns forced people to migrate. This tendency was less obvious in Cherven where due to the good infrastructure people could have a fast connection to urban areas.

countryside itself" (Creed 1998: 13). All of the above signs of disengagement were evident in Cherven. Villagers often combined farming activities (subsistence and/or market-oriented) with formal or informal employment in local industries. Hence, many residents of Cherven commuted daily to Assenovgrad (the municipal town) or Plovdiv (the district capital) where they worked in the light industry sector. During 2004/5 there were limited employment opportunities in the village: employees at the parquet factory amounted to 22 persons, but only 5 of them resided in the village. The red pepper factory, owned and managed by two brothers, employed six of the local Gypsies as seasonal workers for the period from August to November each year. The workers were paid a daily wage in an informal arrangement. The brothers did not offer them official work contracts, thus evading the official social payment. In this case the Gypsies and their employers were participating in the informal sector of the village economy. Other small-scale enterprises in the village such as the plaster factory employed only two villagers. Their employer – a Turkish businessman, they said, was extremely considerate and paid wages without any delay. After the factory was temporarily closed down in the autumn, he relocated the villagers to his private hotel in Assenovgrad. In this line of small-scale industry in the village, I should mention the shoe-producing workshop employing around 40 women - only 3 were residents of Cherven and the rest commuted daily from the neighbouring villages of *Topolovo* and *Muldava.*[61]

Villagers were also occupied as shopkeepers in the three grocery shops, bar tenders, waiters (waitresses) in local cafeterias/restaurants/family hotels, construction workers, and guards (three members of my host kinship group worked as guards in the locality). A few of the villagers were employed in administrative positions (e.g. clerks in the village post office or administrators in the Mayor's office). My host, Iliya was a policeman, responsible for Cherven, and three other smaller villages in the proximity – *Gornoslav*, *Dolnoslav* and *Muldava*. Dancheto (his sister-in-law) was the new secretary of the Mayor and the only person with a university degree in the family.[62] In general,

[61] *Muldava* and *Topolovo* were ethnically mixed villages situated in close proximity to *Cherven*. The residents of *Muldava* (1 285) were of predominantly Turkish ethnic background. Only a few Bulgarian families had remained to live in the village. In comparison, *Topolovo* was considered to be a large settlement with around 2 800 permanent residents. The village ethnic composition was balanced with a ratio of 50:50 between the ethnic Turks and the ethnic Bulgarians.

[62] Dancheto (the short colloquial name for Yordanka) was raised in Plovdiv where her family moved to live, out-migrating from Cherven. Later Dancheto got married in the village and returned to live with her husband (the brother of my hostess Rossi) in his parents' house. After graduation she had been unemployed for some time. Not able to find a job corresponding to her level of education in the village and elsewhere, she accepted

the young villagers sought employment in local industrial enterprises, mainly in the parquet factory. Even pensioners were looking for employment despite the limitations set by their old age.

The resulting diversification of labour activities and employment options was a response to devaluation of farming and "shrinking of agriculture" in the Bulgarian economy. Therefore the current situation in the rural countryside reflected these social changes - a direct result of government policies directed towards rapid industrialization and urbanization during socialism.

Conclusion: End of State Support

The purpose of this chapter was to demonstrate how following decollectivisation, farming in Cherven had ceased to be the dominant mode of economic engagement - production and employment - as the proposed term "exclusion from the land" suggests. During socialism the local cooperative was one of the most efficient and successful cooperatives in the region. The end of state socialism signalled the end of preferential treatment of agriculture by the state. Being ideologically motivated, the dismantling of the cooperative agriculture ultimately led to the loss of the Soviet and former socialist markets. As a result the termination of state support for agriculture ended the mass privileges in the sector. In this context the majority of villagers not only in Cherven but all over Bulgaria felt disengaged from the land in the meaning suggested by Gerald Creed (1998). In reference to the theoretical framework proposed in the thesis, I could further develop his idea by arguing that agriculture represents one sphere of social and economic exclusion for the majority of rural dwellers. The economic aspects of exclusion are related to pervasive unemployment in the sector, diminishing state support, increasing production costs, low profitability and ensuing lack of motivation of farmers. The social aspects of exclusion are noted in undermining rural identities based on farming as a dominant source of livelihood. Social exclusion is also related to the further marginalization of rural areas which reinforced rural-urban distinctions in terms of population size, incomes (labour market), availability of jobs, access to information, education and culture, access to services – health care, sanitary. All these reductions in

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work in the local cooperative, measuring at the scales for 4 years. Her present secretarial position she obtained in 2004.

the standard of life in rural areas followed the dramatic decrease in production after dismantling of the cooperative farming.

The paternalistic socialist state could be metaphorically compared to the traditional family organisation known as *zadruga* to the extent that it replicated and represented features and functions associated with the extended family: tradition, security and protection, satisfaction of basic needs, collective action, and suppression of individual expression, initiative and preferences. The socialist reforms had introduced new technologies in agriculture. The socialist state had improved the living conditions and standard of the village people by offering them secure employment, permanent incomes, and important social benefits such as regular vacations, free education and medical service. On the other hand, the individual business activities were tightly regulated and private enterprise – largely restricted. As a result most aspects of production and consumption were centralized and the outcome was a seemingly egalitarian society (Kolev 2002: 214). After the changes (the end of state protection) the features of the collective society disappeared and turned into their opposites: insecurity, lack of protection, fragmentation of community and dismantling of collective institutions (e.g. farming cooperatives). As seen from the examples with the private farmers in Cherven, now individual initiative has become as important as is any other form of capital – this leading to a situation in which a minority could prosper and a significant majority is excluded. In this context processes of social differentiation and inequality were triggered.

In this chapter I showed how the end of state support for agriculture had resulted in local actors making choices and counting the advantages and disadvantages of individual private farming under the new economic conditions. In the next chapter I explore the development of rural tourism in Cherven as expressed in the fast proliferation of tourist facilities – hotels, restaurants, and cafes. The new orientation of rural families – providing services to tourists – was a marked trend in Cherven – the village where I witnessed the establishment and functioning of three family run hotel complexes. Under the new circumstances the ability to transform and use skills and resources from the socialist past was decisive in organizing the new private enterprises.

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Chapter 4

FAMILY BUSINESS AFTER 1989 – OBSERVING THE CHANGE THROUGH CONTEMPORARY EXAMPLES[63]

"Entrepreneurship": Meanings and Contexts after Socialism

The general purpose of this chapter is to introduce another dimension of the village economy - the notable expansion of rural tourism. The agents of this economic transformation were the families of a few enterprising businessmen. As I have shown in Chapter 3 after the liquidation of the socialist cooperative in the early 1990s, farming had ceased to be dominated by state-controlled structures. Consequently new social and economic reforms opened space for private initiatives and enterprises. In Cherven two private farmers produced milk for big manufacturing industries. They, however, generated an insignificant number of jobs for the local population and mostly relied on their families for business support.

Similar was the case with the advancement of rural tourism in the area as ongoing alternative to farming in the last few years. This type of tourism in Cherven has been introduced by a few enterprising families who established and managed hotels/restaurants. The three leading families have started their business around the time of my fieldwork 2004 – 2005. So I was in a position to trace these new developments throughout my stay in the village and even after - during occasional visits. In this way I managed to collect information through personal observation. Additionally in July 2007 I came back to the village especially to interview the wives of the entrepreneurs.

I was able to have a closer personal contact with the family of Peter Tochev. I have already introduced him in Chapter 3 as one of the successful independent farmers in the village. His case is very specific in the way it demonstrates how private farming could be combined with another type of family based economic activity – hotel/restaurant management.

At the core of the chapter I review the enterprises and introduce the three families responsible for their establishment and operation. Hence I look at how significant

[63] This chapter was developed into a publication; see Bogdanova (2008) in the references.

characteristics of tourism industry get integrated into the dynamics of family relations. To facilitate the comparison, I have addressed similar questions to the wives of the business representatives. Generally the structured interview questions had a twofold purpose – revealing the business in details, and exploring its familial foundations. Thus the questions particularly related to the business aspects consider the motives behind initiating the enterprise, modes of financing and expanding, promotion strategies devised to attract clients, types of clients, employment policies, and reactions to competition. Another set of questions were intentionally designed to explore the impact of family relations and gender roles in the context of family business. These questions touch on topics such as distribution of rights and responsibilities among family members, division of labour in the business, decision-making practices, and involvement of children in the family enterprise.

Another purpose of the chapter is to acknowledge the latest ideological foundations of the rural economy and document the shift from socialist (collective) economic ideologies to individual modes of thinking and acting as confirmed by the increase in entrepreneurial activity. Entrepreneurship is a not a new social phenomenon for Bulgaria but only after 1989 it had become an object of serious academic research (Manolov 2000; Genov & Karabeliova 2001&2003; Davidkov 2002; Genov 2004). So far a considerable number of studies have been produced to explain what the motives of the new Bulgarian entrepreneurs are, what type of culture-specific environment exists in the country and to what extent national cultural traits have influenced the development of a specific economic culture associated with entrepreneurship (Minkov 2002; Alexandrov 2002& 2004; Iliev 2004; Ditchev 2004; Ganev 2004; Chavdarova 2008, 2005, 2004a&2004b).

In my analysis I define the term “entrepreneur” as a person devoted to performing distinctive economic functions such as decision-making, planning, investing, risk-taking, saving, organizing and managing. The basic features associated with entrepreneurial activity are initiative and creativity in establishing a business enterprise, competitiveness, self-exploitation, specific attitude towards accumulation of wealth and capital. In this sense I refer to the three families presented in this chapter as entrepreneurs or enterprising families. More specifically my research focus is the private family enterprises related to hotel/restaurant management and regional tourism. Nevertheless, this terminology (“entrepreneur” and “entrepreneurial”) might also be appropriate in the two cases of individual private farming reviewed in Chapter 3. Hence, the two farmers, Peter Zheliyazkov and Peter Tochev, could still be viewed as entrepreneurs since their economic

performance in the sphere of agriculture corresponds to the meanings I have attached to these terms.

While researching the families of the new hotel owners in Cherven, I noticed the growing resentment towards them in related conversations. Naturally in the open market economy the new economic possibilities had triggered processes of social differentiation. Therefore I could not completely ignore this subject. However I need to make clear the public context of entrepreneurial activity in Bulgaria. According to Marxists, capitalist forms of private property and enterprise were associated with exploitation of workers and hence were ideologically discredited (Kolev 2002: 207-208).[64] In the first years after 1989, the official political attitude towards entrepreneurship and private capital accumulation had been modified. It is interesting to note how at that time the leading Bulgarian press strove to validate and represent the new postsocialist entrepreneurs in positive light; newspaper articles encouraged private initiative through disseminating relevant knowledge about firm management and other market information (Mineva 2004; Nikolova 2008; Mitev 2008). Therefore the Bulgarian press (both independent and politically affiliated newspapers), as a powerful opinion maker, formed certain attitudes and dispositions towards the emerging postsocialist entrepreneurs. The privatization of national industries in the mid 1990s, however, was an occasion that provoked much controversy and distrust towards the new business owners (Tchalykov 2008). H. Alexandrov (2004: 155) reveals the negative connotation of entrepreneurship as a social and economic practice in Bulgaria:

> "Not surprisingly, the image of the new, post-communist business in Bulgaria is quite ambivalent – the traumatic experience with the redistribution of the publicly owned enterprises in the process of privatization and the criminalization of whole sectors of economic life in the 90s has cast a shadow of suspicion on entrepreneurship in general. It is still perceived by many not as a creative form of social participation, generating public as well as private goods and well being, but rather as a morally reproachable and potentially destructive activity, which has more to do with appropriation of public resources for private ends by means of corrupting and abusing power."

[64] This reminds me of one basic difference between Poland and Bulgaria. The Polish people had the opportunity to run their private farms during socialism. In this way they gained necessary production and merchandise skills to make use of after the changes. The tradition of private farming in Poland was never fully interrupted but only partially brought under government control and regulation (Hann 1985; Pine 1995).

Naturally such negative social reactions placed the emerging group of entrepreneurs in the precarious position of "public enemy". On the other hand, H. Alexandrov claims, the Bulgarian entrepreneurs were not able to produce "meaningful explanation of their success, legitimizing their newly acquired social status" (ibid.). Furthermore, he concludes that owing to the prevailing "culture of dependency and survival", the most progressive people in the Bulgarian society, the entrepreneurs, could be regarded as "an excluded and alienated minority" (ibid: 157).[65] This conclusion seems appropriate and justifiable considering the egalitarian dispositions in the Bulgarian society solidified during socialism but existing well before this period.

Taking into consideration the ways entrepreneurship is generally regarded, I try to assess what the consequences for the community could be in respect to differentiating practices and discourses taking place in the village. As a result I explore another dimension of family business – ways of self-identification and related legitimating discourses. In the same line I asked the wives of the leading entrepreneurs if they felt somehow different in status or class from other villagers. In the analysis I attempt to highlight the process of social differentiation taking place within the village community. As a result I show how the new occupation (entrepreneurship) creates new group identities by reshaping lifestyles and social relations.

Another important theme in this analysis is related to social and cultural capital and their impact on the success of the family enterprises. Kirsten Ghodsee (2005) writes about tourism and gender on the Black Sea coast, exploring the relative success of women employed in this sector after the communist regime. She reveals how market forces influenced the social and economic position of professional women working in the Black Sea resorts. After the changes, she argues, the importance of social and political capital was significantly reduced as forms of cultural capital (skills, education and previous experience) gained crucial significance in the developing market economy. Kirsten employs Bourdieu's (1984) term of social and cultural capital to connect her findings to the case of central Europe described by Gil Eyal, Ivan Szelenyi, and Ellen Townsley (1998). Thus both studies conclude that cultural capital was the necessary prerequisite for a success in the postsocialist economy.

[65] In the period 1995 – 2000 H. Alexandrov (2002) conducted a research interviewing around 30 representatives of the formal and informal business in Bulgaria. He then classified the cultural background in Bulgaria as being "egalitarian and explicitly hostile towards the efforts directed at individual economic prosperity" (ibid: 23).

In my analysis I explore how certain forms of cultural capital, professional training and experience gained during socialism, contributed to establishing the family enterprise and attaining a distinctive status in the community. Similarly important is social capital (defined both as social and kinship networks in Chapter 2) and its possibility to be transformed into economic and political capital. In this regard I try to define what type of networks the three families can access or try to attain in order to facilitate their business expansion and solidify their positions in the community.

In addition social capital could be easily connected to the subject of social exclusion discussed in Chapter 2. Thus individual entrepreneurs could be seen as exemplifying the Anglo-Saxon definition of social inclusion with its emphasis on the development of the individual potential and resources. Hence by integrating their businesses into the specific social environment the enterprising families made use of their available economic, cultural and social capital. On the other hand, the rural entrepreneurs could be also viewed as excluded from the mainstream society in the way Alexandrov (2004: 157) suggested in the above citation.

Cherven in the Context of the Regional Tourism

According to estimations broadcast in the national media, in recent years Bulgaria has become a popular tourist destination ranking among the top in Europe. Naturally the Black Sea coastline is attracting most of investors' attention. There fast construction and expansion of tourist facilities – hotels, restaurants, entertainment parks – have even brought concerns about environmental safety. In similarity to the coastline area, small villages in the Bulgarian countryside were undergoing similar resurrection. Owing to the state support for the growing tourism in rural areas, many attractive sites were recently renovated. The expansion of rural tourism is thus explicitly related to specific EU programs for regional development. The Bulgarian Ministry of Regional Development and Public Works has carried out several PHARE projects related to the Rhodope Mountains.[66] One of the projects is titled "The Rhrodope Holy Mountain" (2003) and its main focus is to facilitate

[66] The PHARE programme is one of the three pre-accession instruments financed by the European Union to assist the applicant countries of central and eastern Europe in their preparation for joining the European Union. Originally created in 1989 as "Poland and Hungary: Assistance for restructuring of their economies", PHARE has expanded from Poland and Hungary to currently cover ten countries. It assists the eight of the ten 2004 accession Member States: the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, and Slovenia, as well as those countries that acceded in 2007 (Bulgaria and Romania).

access to the churches and monasteries in the area.[67] It envisions the creation of cultural tourist routes through the Rhodopes, integrating many villages south of Assenovgrad.[68] In this way EU projects have fostered and re-established local identities based on cultural heritage, emphasizing religious and cultural tourism in this particular case. The area is favourable for developing this type of tourism due to the majority of attractions such as the ancient sanctuaries - Belentash, Perperikon, and Krastova gora – in combination with numerous churches, shrines and monasteries, including the famous Bachkovo monastery.

Unfortunately Cherven in 2004/2005 was not part of this network. Nevertheless the village has recently become a significant site for capital investment. In this period the village had around 800 permanent residents according to official data. Taking into account the increasing number of villa owners, during the weekends and summer months a total of 1000 people lived in the village. Acquiring property in Cherven has become rather expensive in recent years – garden plots with houses ranged from 20 000 to 30 000 BGN. Even so, the contingent of villa owners in the area is continually rising since Cherven is very well located in terms of access to the district capital of Plovdiv (29 km) and the municipal town of Assenovgrad (10 km). The main highway connecting Plovdiv to the south-eastern part of Bulgaria divides the village in half. The village centre is located along this highway and thus is continually exposed to the heavy traffic of cars and buses. As a result transitory visitors, villa owners but also tourists regularly pass through the village. Apart from visitors from Plovdiv and other settlements in the area, the village attracts international tourists owing to the tourist routes going through the Rhodopes.

The good location of the village and the economic investments aimed at stimulating the development of regional tourism help explain the processes of business expansion in the village. One particular pattern of business development stood out clearly reflecting the modern tendencies in the region – the proliferation of tourist facilities, more specifically the increase in the family run hotels. In 2006 Cherven had two family run hotels and a third one in process of completion. Considering this tendency, family based economic networks had now put extra emphasis on participating in the expanding market for tourist services, thus aiming to attract foreign visitors to Cherven. The potential of the market expansion has now become a real opportunity with Bulgaria's entry into the EU effective since January 2007.

[67] The full description of these PHARE projects is available on the website of the Ministry of Regional Development and Public Works: http://www.mrrb.government.bg.
[68] See the map in Appendix 6.

During my fieldwork I observed three cases of successful entrepreneurial activity, mostly based on family relations. The following narratives indicate how the most successful group of village inhabitants managed to adapt to the dynamic context of social and market relations. As a result they have become the main agents of change whose family run hotels and restaurants transform the public space in line with the standards of international tourism - comfort, luxury and good client service. One further effect of these entrepreneurial activities is the ongoing conversion of Cherven into a local leisure centre.

Three Cases of Family-run Business in Cherven

> "I focus on the family for several reasons. First, the long-term distinction between public and private spheres – at least as this distinction has been imagined in the post-Enlightenment cultures of Western Europe – casts the family as a protected and autonomous space. Sheltered from the enforced laws of the state and the iron laws of the capitalist market, "home" is a place where people are supposedly free to act in accordance with their personal desires and beliefs. The family is thus a privileged site for exploring the concepts people use for managing their own actions and for interpreting the behaviour of others. Moreover, the family's composition casts it as a privileged site for exploring how people experience, enact and enforce differences of gender and generation" (Collier 1997: 9).

This passage suggests a few notions about the family, mainly, as a sheltered space where human desires and actions could be liberated from external influences. I challenge the presumption that the family is a private territory, sheltered from outside factors. On the contrary, the family has always adapted to external environment, striving to overcome difficulties and reproduce from generation to generation. What I suggest in this chapter is that in response to the new political and economic context, the family is now engaging in the market economy. Therefore, I focus on family businesses in Cherven.

My case studies demonstrate how "home" has become the arena for new economic activities and thus facilitate the social integration of family members. Similarly Frances Pine observed in relation to rural Poland "an expansion of household production and kinship obligations" (Pine 2002: 99) as a reaction against the economic and social exclusion prevalent in rural communities during postsocialism. Above all, when initiating a private business one assumed personal responsibility for one's family in the context of limited state

social security. In the village I observed familial engagement in business related to providing public services and expanding related facilities.

The significance of family businesses in postsocialist economies could be considered in a comparative perspective. During the last twenty years Bulgaria has been transformed economically and socially as new powerful business and political elites have emerged and gained social importance. In line with the new changes, Cherven underwent drastic reforms in agriculture with the disestablishment of the agricultural cooperative, resulting in massive unemployment. In the past, as now, villagers engaged in family based agricultural production. They raised crops or bred animals and sold the produce of fruits, vegetables or meat to the state. During socialism rural households often combined state jobs with farming private plots. This practice has continued but now villagers combine jobs in the new private sector with farming their plots. The collapse of the state-supported agriculture had led many of the villagers to diversify their economic profit-oriented activities. Many of them migrated to live in the urban areas. But some managed to initiate new private businesses and stayed in the village.[69] Hence, I am interested in studying these villagers (in two of the three cases I refer to families originating from Cherven) who managed to establish their private family enterprises in Cherven.

Mitko and Diana

The process of local business development was already underway prior to Bulgaria's long awaited membership in the EU. The first family-run hotel/restaurant in combination with a grocery store opened doors in 2004. Mitko, a successful businessman from Assenovgrad, had decided to transfer capitals from his urban business and start a new venture in a rural context. The hotel complex "Diana", obviously named after his wife, is extensively advertised on the Internet, along with many other hotels and vacation houses in the region. In 2005 the hotel had a capacity to host 20 people in 6 double rooms and 2 apartments in a modern, moderately tall building surrounded by a neatly kept garden.[70] A small grocery shop was located in front of the complex selling basic food stuffs, cosmetics and other personal items to tourists and local residents. Immediately behind the shop inside the complex there was a small tavern. At the back of the hotel there was a terraced swimming pool, surrounded by tables where drinks and food could also be served.

[69] Michal Buchowski (2001: 152) observes the same tendency in relation to rural Poland.
[70] Updated information about the hotel facilities is available on the official website of the complex: http://www.complex-diana.com/index.htm

Diana explained that the choice of Cherven as a setting for their business venture was made at random. Since neither Mitko nor she had any relatives in the village, kinship and familial networks were not considered as a determining factor. Nevertheless I suspect the choice of Cherven was not incidental at all. Given the good location of the village in terms of fast connection to neighbouring towns and villages, the establishment of all accessible hotel facilities makes perfect sense. As I have mentioned earlier Mitko had a successful business in Assenovgrad – keeping and renting warehouses. Later he started building the hotel in Cherven and for some time the two businesses existed in parallel. Diana managed the business in Assenovgrad while her husband handled the new venture. In time the spouses abandoned the warehouse business to mainly concentrate on establishing and promoting the hotel complex. During that period they did not farm land, nor did they operate any other major enterprise. As all their capital and efforts were redirected towards the expanding rural business, they relocated from Assenovgrad to permanently reside in their hotel in the village.

Their restaurant opened doors in 2001 and three years later - in 2004 - the hotel facilities were finalised and started hosting clients. In addition to offering affordable services to tourists the hotel complex soon became a favoured setting for various events: office celebrations, weddings and birthdays, as many outsiders from Assenovgrad and Plovdiv booked the facilities. During the summer the swimming pool attracted many families with small children coming from Assenovgrad or Plovdiv on weekends. Therefore the complex had gained a reputation as an accessible recreation facility for families and local youth.

As the business has proven to be profitable, Diana and her husband decided to expand it. In 2007 they bought a plot of land opposite the complex for building additional accommodation for tourists. This venture was financed through a mortgage loan. The practice so far had been to finance the business without borrowing credits. Diana admitted they had never applied for any EU subsidy. She explained that Cherven was not connected to any of the tourist routes developed in the region.[71] Diana attributed the omission of the village from the approved routes to negligence on the part of the Mayor. Nevertheless, she admitted, nearby villages with ethnic Turkish population (e.g. Muldava) were given priority

[71] I have mentioned earlier in the text that these routes were part of a tourist network covering villages and various natural attractions in the country and originated as a result of EU sponsored PHARE projects and related government policies of regional development.

over Cherven most likely because of the prominent position of the party *"Movement for Rights and Freedoms"* in the Bulgarian parliament and government.[72]

Consequently Diana and Mitko did not rely much on tourist routes and corresponding tourist flows for securing clients for their hotel complex. Instead their promotion strategy focused on extensive advertisement on the Internet. In addition they regularly participated in tourist fairs and even have their own promotion stall during the annual trade fair in Plovdiv. The hotel was additionally advertised on billboards situated at the entrance and the exit points of the village. Diana admitted to cooperating with several tourist agencies specialized in hunting tourism and as a result they hosted groups of hunters in the autumn. Nevertheless Diana and her husband were not members of any related associations despite the definite advantages such kind of membership would have granted. So far they had not been interested in having such an extensive network of contacts, Diana confessed. As I have already discussed among Diana and Mitko's clients were families with small children, or tourists from all over Europe who had seen their Internet advertisement or heard a good recommendation. Therefore as a consequence of all strategic promotion they had already built an extensive network of regular clients.

At that time they had around 12-13 hired workers for the hotel and restaurant. Among their employees young people prevailed in the age range from 20 to 40. They preferred hiring people from Cherven to avoid paying the travel expenses of workers commuting from outside the village. Even so, only three workers from the village were employed in the complex. Other staff members commuted daily from close villages or Assenovgrad. The small number of personnel was not conducive to providing a good service, Diana explained. Hiring more people was a problem despite the massive unemployment in the area since village people preferred working in the towns for more prestige. But she thought it was still important to create jobs here in the village.

Another important issue to be examined in relation to the family business was how obligations, rights and responsibilities were distributed among the family members. In this connection Diana provided some useful details. Generally she was dealing with issues pertaining to organisation and staff management. Her husband was in charge of organizing supplies. Both of them engaged in bookkeeping. This division of labour was predicated on

[72] *"Movement for Rights and Freedoms"* is publicly recognized and accepted as the party of the Bulgarian Turks. It was established after 1989 as a reaction against the massive repression of this minority group during socialism.

mutual agreement between the spouses, where each of them had an equal share of participation in decision-making.

During the interview Diana occasionally interrupted our conversation to serve the clients entering the grocery shop. According to her explanation, she had to replace the shopkeeper for the moment. For me Diana's brief engagement as a substitute shopkeeper indicated her in-depth involvement with the business. She personally handled matters of emergency and was available to do almost every kind of service job around the complex if necessary. I remembered an occasion when she together with her husband was cleaning the area surrounding the swimming pool to prepare for the opening of the summer season. Their eighteen year old daughter was in charge of the bar near the swimming pool. Diana told me the daughter intended to study international tourism at the University of Varna. Therefore in this case I could observe how the family business as a mode of earning and living predetermined the professional orientation and lifestyle of the young successor to the enterprise.

How did professional education and experience (as forms of cultural capital) correlate with the entrepreneurial activities in Cherven? Diana had been enrolled in a law program for the time when I first met her in 2005. On our second meeting she had already completed her education and obtained the law degree. When I asked how she utilised her university education in the present occupation, she replied that her law expertise helped her devise formal agreements and contracts. Later I came to know that in addition to her law training she had other qualifications as well – engineering and pedagogical.

In managing the business she and her husband were equal partners, Diana claimed. Together they made important decisions related to the expanding business often considering the opinion of their daughter. Previous business experience had helped the couple create a successful family enterprise without enlisting the help of any consultants. As Diana put it, they continually responded to clients' needs and used them as basic guidelines for further improving the services. In her opinion, Bulgaria has been a traditional tourist destination, so there was a vast potential for business development. Tourists avoided big resorts and preferred cosy family hotels more and more. To my surprise, she stated that compared to other international visitors the Bulgarians make the best clients: "when Bulgarians have money they know how to live".

When I interviewed Diana about her role in the family business I asked her how she would identify herself. She indicated that she thought of herself as a "hotel-owner/manager." When I asked her how her family's economic and social status compared with that of other villagers, she asserted that her own family was better off. However, she emphasized that she and her family worked hard and made personal sacrifices in order to provide clients with superior service, as if attempting to justify her privileged position. By seeking justifications, Diana implicitly revealed her awareness of the emerging social distinctions in Cherven. Diana's reference to "hard work" was an attempt to give an acceptable reason for her upward social mobility.

Kirsten Ghodsee (2005: 169) similarly addresses the problem of justifying emerging class differentiation in a system of "functioning meritocracy." Hence upward social mobility is regarded as a natural result of hard work, skills, and expertise (accumulated cultural capital). Ghodsee (2005: 169-171) contends that the underlying issue is how limited access to cultural capital (education and training) has solidified class positions and determined prospects for social mobility under postsocialism. Consequently now education has become a commodity, and only people who can afford it can gain legitimacy as elites. It would thus seem that limited access to education would determine the process of class construction in postsocialist Bulgaria. In Cherven I could observe how the majority of young adults with little education or specialised training were employed in low-skilled jobs, which greatly reduced their options for upward social mobility.

In the meantime hotel "Diana" was very soon facing the competition of two other family hotels in the village. When questioned on the topic, Diana stressed the established practices of doing business and attracting clients as a definite advantage. Nevertheless she complained about disloyal competition on the part of business opponents and ruled out any form of cooperation with them. The two rival families, however, had their own set of competitive advantages. Most importantly they were very well embedded in the social fabric of Cherven. Both families had originated in Cherven and consequently had extensive networks of relatives and friends there. In contrast, Diana and Mitko were newcomers to the village, and as such were still struggling for support and social acceptance. The social context within which the three competing families operated was in part critical to their success. Hence, social relations and kinship networks could be extremely supportive and advantageous as a form of valuable social capital in small communities.

Diana and her husband were aware of their status as outsiders and persistently strove to place themselves in a position of power/authority so that they could be accepted and have some influence in the village. Hence in addition to running a successful tourist enterprise, both Diana and Mitko aspired to partake in local politics. Twice they participated together in local elections, each time Mitko was a candidate for the Mayor's post in Cherven while his wife was pursuing the same position in the municipal town of Assenovgrad. As a result the family strove to expand their power and capital in each of these aspects – economic, social, and political.[73]

Peter and Katya

The hotel/restaurant combination was so successful that very soon this pattern of business development and marketing strategy had been adopted by two other village entrepreneurs. The first to follow Mitko's example was Peter. During my fieldwork I established regular contact with Peter, his wife Katya and their two sons – Martin and Hristo. Their small family restaurant was situated in the central square of the village just next to the main road, separating the village into two halves. The restaurant was officially opened in December 2004 and started operating at full capacity in January 2005. It was during my stay at the village, that the family added a small hotel to the restaurant, expanding it to accommodate 10 guests.

Before proceeding with more details I need to highlight that I had a different approach for collecting information in this case. It was easier for me to establish personal contacts and forge a sort of friendship with the hotel owner and his wife. In this way I was able to gather first hand information through daily observation (e.g. I regularly dropped by to drink my morning coffee at their restaurant), and in 2007 I came back to interview Katya. The husband Peter was much more accessible for interviewing in comparison with Diana's husband, Mitko. While interviewing Katya I asked her a similar set of questions and addressed the same topics present in my conversation with Diana. In this way I was able to compare the enterprising families and look at the similarities and differences between them.

After 1989 Peter had made two unsuccessful attempts to launch private businesses each time in cooperation with partners. The third attempt, in 1994 he started a private dairy farm in Cherven this time on his own. This last venture succeeded and to date he has been involved in milk production for around 14 years. He owned one of the biggest private

[73] Unfortunately I did not have the chance to observe any of their election campaigns since they had taken place prior to my coming to the village in October 2004.

farms in the village. As I have demonstrated in Chapter 3, Peter was one of the two very successful private farmers in the village. He managed to expand his diary farm by purchasing more cows and modernizing the farm following a successful application to SAPARD in 2007.

After one failed attempt to obtain EU funding for developing his hotel business, Peter started by investing his monthly income from the milk – around 4000 BGN in 2005[74]. He built and furnished the hotel with a bank credit. In order to get the first loan he mortgaged his father's house in the village. Despite high risks Peter managed to create a combination between private farming and hotel-restaurant management. In fact the animal husbandry provided capitals for expanding the catering business.

Katya reassured me that the decision to start the hotel/restaurant enterprise was spontaneous. Peter had first developed the strategy behind the new endeavour and related decisions were agreed upon after family discussions and disputes. He had a deeper insight over the problems, Katya admitted. She continued by clarifying that preceding the hotel there was another family business – the diary farm still existing to this day. Consequently after the successful application to SAPARD in 2007, the elder son Marin quitted his job in Plovdiv in order to devote his full attention to upgrading the farm. In the meantime his younger brother Hristo was involved full time with the expansion and management of the hotel/restaurant business. Katya explained that the hotel business was thought of as an economic alternative to farming, thus allowing their sons to expand their range of employment opportunities. Husbandry, Katya admitted, was a difficult branch of agriculture in a context of volatile markets and stringent EU standards. Hence considerations of social and economic security underlined the initiation of the hotel business which they ran alongside with the established family practice in diary farming.

During socialism Peter and Katya resided in Assenovgrad. Later they sold their apartment and moved to Cherven. Presently Peter and Katya lived in a comfortable house near their family hotel.[75] At that time he was employed by the local cooperative and served as a food

[74] During the same period the average wage in Bulgaria was in the range between 300 to 600 BGL.

[75] The history of the building, now sheltering Peter's hotel and restaurant, illustrates the changes and transformations that swept through the Bulgarian rural countryside in the past decades during the periods of socialism and postsocialism. A hundred years ago Peter's grandfather owned the land where the building was now, at the very centre of the village. The property was confiscated by the state in 1902 and the land became the site for the village school. In 1935, following a royal regulation, the school building was expanded to accommodate children from the neighbouring villages who commuted for schooling to Cherven. Until 1970 the building functioned as a local school. In that year a new school building was officially opened and the old

provider to the local shops and school canteens. This position gave him unlimited access to important networks that had been established in the period of socialism and which he now utilized to develop his private business. Peter explained how he had coped with deficits characteristic of the socialist planned economy: he had maintained close relationships with the directors of the food-producing factories. During those times Peter invited them to his home for dinner and served them lamb – a delicacy usually consumed only during Easter and New Year. After these lavish dinners the directors of the factories satisfied the local consumption needs by granting privileged access to resources for Peter. In such a way private networks based on informal relationships, more commonly regarded as ties or "vrazki" in Bulgarian, served to promote the preferential treatment of one municipality over another. In this informal, unofficial way, the problems with consumption and spending caused by the state-supported economy of shortages were partially overcome and the flows of the official system partially corrected. This approach to problem-solving was retained after 1989 but nowadays personal networks were diversified in relation to the social needs they aimed to satisfy. In the case of Peter Tochev his private social network now included former colleagues, former business partners, bank officials, present or potential clients, other businessmen, and state bureaucrats (Boissevain 1974; Ledeneva 1998). It is interesting to note the shifts in personal social networks during postsocialism. As demonstrated before social networks were used to compensate for social or material deficits in the system (Kornai 1980). There is a massive body of literature addressing the topic of network shift in the period of postsocialist transformations. Among the latest books focusing on the Bulgarian experience, I should point to a collection of papers written by Bulgarian researchers, published under the title *Mrezhite na prehoda: Kakvo vsyshtnost se sluchi v Bylgaria sled 1989?* (2008) (translated in English as "The networks of transition: What did actually happen in Bulgaria after 1989?").

I was equally interested to learn how Katya and Peter's promotion strategy compared to that devised by their business rivals - Diana and Mitko. Katya replied that for now the promotion was based upon good quality service. Still they did not have paid commercials, regarding them as effective but very costly. The expensive advertisements, Katya explained, were not justifiable in view of the underdeveloped hotel business. Hence the difference in the advertising approach between the two families was clear – while hotel "Diana" enjoyed expensive promotion (internet advertisements, billboards, etc.), Katya and

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one was used as a student dormitory. During a privatization auction in the early 1990s Peter obtained the ownership rights over the place, thus returning the property back to the family.

Peter who had just started their business still refrained from investing in expensive advertisement. Nevertheless Peter's ambitious strategy for developing the hotel included establishing regular contact with international clients and hosting groups of foreign tourists. In such a way he strove to expand his social contacts and accumulate social capital in order to guarantee the prosperity of his business.

Types of clients as well varied. Every day while passing through the village central square I saw Katya and Peter serve coffee to clients from the village. For the hotel they counted on families making excursions around the country. Katya confirmed that the tourist routes were already taken over by others and it was hard to make a breakthrough. The flow of tourist was already allocated along other networks of hotels/restaurants. For these reasons Katya similarly to Diana could not count on the tourist routes but attracted international clients independent of these structures. In the spring of 2007, she said, the hotel hosted many guests coming to take part in the hunting and fishing competitions in the region.

It is worth acknowledging how family duties were redistributed among family members, and how internalized gender roles were replicated in the context of familial business engagement. To my question how were the tasks allocated among family members, Katya replied that there were no fixed duties – each family member could do multiple jobs around the complex. Indeed all family members took turns to work in the kitchen, take orders, and serve drinks and food to clients. Nevertheless based on my observations I assumed that Katya's basic obligations involved cooking and cleaning in the kitchen, plus cleaning the hotel rooms. I saw her regularly attending to the clients aided by her husband and her son Hristo. Now she benefited from her previous experience in catering - she was a manager of a school canteen in Assenovgrad during socialism. Hence unlike Diana, Katya was regularly doing all kinds of manual jobs in the hotel and restaurant. Peter had thought of hiring more staff in view of the expanding business. But regardless of his desire to train personnel such people were hard to find. Katya explained that some of the villagers would prefer unemployment since they were scared of handling job responsibilities. Peter was negotiating with construction workers and supplying the materials for the repairs. He was also responsible for the public relations and promotion strategy of the enterprise – networking with potential clients and tourist agents to attract more international visitors. Their son, Hristo had the responsibilities to go and supply the restaurant with provisions and drinks. This clear division of labour suggests the reproduction of the gender identity though economic activities – men dealt with the external world, women engaged in domestic space. Yet balancing home work with duties at the hotel was getting increasingly difficult.

Because of the clients staying at the hotel Katya and Peter slept there and rarely came back home. They cooked for themselves at the restaurant kitchen, hence there was very little time left for attending to the house. At the time Hristo slept at the house all alone. Katya cleaned the house once a month.

To my question *"In what ways do kinship ties help in business?"* Katya replied that their relatives from the village were their most loyal and regular customers. Indeed Peter was very proud of his family lineage. Once he showed me his family tree, painted on a big poster. Peter considered placing a small version of his family tree on the wall near the main entrance to the hotel. The origin of Peter's family can be traced back to the period of Ottoman rule. The family legend states that the forefather of the family, Tocho, was said to have killed a Turk and then fled his village to hide from persecutors. He decided to come to Cherven where he started the family line. Amongst the present family members, Peter claimed the present-day Mayor of the village. The family was politically powerful during communism when some members occupied key positions with respect to the local party hierarchy. In fact there was a marked continuity in the village with respect to former communist elites that had been and still are very influential.[76]

Several times during our conversations Peter pointed out to me that he regretted the poor economic conditions in the countryside since they preclude any production growth and business expansion and allow only for the preservation of current capital and production. His business venture was a poignant demonstration of his will to fight this tendency and reverse the negative economic practice. In relation to the economic environment in the country, Peter pointed out that the lack of a functioning legal system impeded the development of private business. He explained that *"whatever good is produced by the private entrepreneur, it is difficult for him to preserve it."* The chaos in the country often linked to the practices of corruption and a dysfunctional legal system was reflected in the state of private entrepreneurship. As a result Peter was running his business in the context of social mistrust *(*Giordano and Kostova 2002). In this situation exclusive reliance on family members and personal networks in opposition to mistrusted public structures became one basic characteristic of the initiated private businesses in Bulgaria (Genov 2004: 376; Chavdarova 2007).

[76] This marked continuity between socialist and postsocialist development in the village demonstrates how the former elites have succeeded in integrating and adapting to the new circumstances. They retained their status in the community which is an evidence of the social trust and support granted to the socialist party in the rural Bulgaria (Creed 1998; Kaneff 2004). For more details, see Chapter 7.

Among other aspects of the family business I considered was how financial resources were allocated. Katya said that no one in the family was getting paid. Communal funds were used for paying off taxes, bills, loan instalments, licences and other expenses related to the business. Then some money went for covering personal expenses of family members. Most of the profits were reinvested into business expansions. For instance, in 2007 the family had bought one old bakery on the back of the hotel and in its place they wanted to build recreational facilities attached to the complex - swimming pool, fitness centre, solarium and sauna. Katya claimed the business was going well in view of the enduring economic crisis: *"It is difficult time for everyone, so it makes no sense to be wishful thinking"*.

On the topic of competition and cooperation in business, Katya made the following generalization: *"Bulgarians are not ready to establish unions and guilds to protect their group interests in business and trade."* Particularly with respect to her rivals in the village Katya added that great deal of envy still persisted and she did not feel supported by other hotel owners in the village. Yet Katya confessed she would like to see more cooperation developing among them instead of the increasing competition taking place at the moment. On this subject Katya was much more flexible compared to Diana who completely ruled out any joint initiatives.

I asked Katya the same sort of questions about self-identification and social status. She denied any belonging to a distinctive group, differentiating her family from other villagers. On the contrary, she did not feel privileged to own and manage a hotel. Her emphasis was similar to Diana's – hard work, lack of personal time. There were no holidays and days off. Every day the family worked as long as there were clients coming. Katya admitted she only slept for 3-4 hours a day. *"Even unemployed people live better than we"*, said she, implying that work in this business was demanding in the face of growing competition. Katya's self-identification was contained in the simple phrase *"we own such business"*, deliberately avoiding classification as "entrepreneurs". Hence Katya neither differentiated her family from the common villagers, nor did she admit to having special privileges and status. Her attitude contrasted with Diana's explanation. One of the reasons, I think, was the level of involvement of the two women and the nature of work performed within the family. Katya was doing manual work – cleaning, cooking, and serving the guests. She did not employ full time staff to help her. Diana was a manager who employed others to do manual jobs around the hotel complex. There were other marked differences between them: Diana had recently completed her degree in law, Katya was not a university graduate. In addition

Diana was eager to take part in local politics in contrast to Katya. Their conflicting outlooks to social distinctions were implicitly reflecting all these aspects of their individuality.

I could speculate that Katya viewed her status differently than Diana because she was still struggling to establish her family business on the tourist market. In this light it was understandable why Katya was less willing to discriminate her family from the rest of villagers. In addition she and her husband were not major employers, and did not strive to accumulate political influence. I could easily assume that their particular views on class relations were also informed by the different state ideologies they were exposed to: Katya spent most of her adult life under socialism – and so her understanding of social distinctions was influenced by the socialist ideology of egalitarianism.[77] Diana in contrast had less experience under socialism and was more explicit about social differences, even though she sought legitimate justifications.

Perhaps it is important to acknowledge that Diana and Mitko were newcomers to the village and did not have relatives or other important social networks there. In contrast Peter's family had lived in Cherven for generations and he still had a big network of relatives and friends in the village (accessible social capital). Moreover Peter was related to the Mayor (an active member of the Bulgarian Socialist Party), and the Mayor was among his most loyal clients. As a result Peter had access to local political power via his family relations with the Mayor although he was not politically active himself. In contrast Diana and Mitko was desperately striving to gain political legitimacy and public recognition among the villagers, albeit so far unsuccessfully. I can speculate that political stakes were part of the competition among business couples. All these aspects presumably contributed to Katya's perception of equal status - she would not like to declare herself above relatives and close friends. Thus family connections of Peter and Katya were fundamental to their business and to their understanding of their status in the village, while it was not so for the other couple.

Petko and Nedka

The third married couple following the established pattern of hotel/restaurant expansion in the village was Petko and Nedka. They had two children – a teenage son Mitko and a 22

[77] Katya was connected to the Bulgarian Socialist Party via the kinship group of her husband Peter Tochev. As I have already mentioned *Tochevi* has been a politically powerful family in Cherven related to communist ideology and leadership.

year old daughter Radka. Initially in 2005 Petko owned and managed a grocery shop in the centre of the village, just across the street, opposite Peter's restaurant. By 2007 he had already built a fashionable bar and restaurant, next to the grocery shop. The next move in his business strategy was the completion of a family hotel on top of the grocery shop – a vision that became a full-fledged reality by year 2008/9. In such a way he ultimately replicated the successful hotel/restaurant formula devised and exploited by the two other families discussed earlier in the chapter.

I need to clarity that during my fieldwork (2004/5) Petko and Nedka had just initiated their hotel/restaurant enterprise. Hence it was during my interview with Nedka in July 2007 that I came to know more details about how it had progressed. When I went to meet her, Nedka was still busy organizing work at the restaurant. Later she confessed that her involvement with Petko's family had placed a big burden on her shoulders. From the beginning of their marriage she was expected to assist in the family enterprise operating during socialism. Back then Petko's father was a well-known entrepreneur in the village. Nedka's mother-in-law, who happened to be present at our conversation, later explained that her deceased husband was a man with big ideas for business. He effectively ran a small home manufacture for waffles and balloons. The produce was distributed to contracted customers in the country. This *de facto* private family enterprise functioned legally integrated into the centralised economy of socialism. It was officially registered at the farming cooperative in the neighbouring village of Topolovo. The cooperative administration was in charge of bookkeeping. This business existed in the period 1983 – 1990 as long as Petko's father was alive to keep it going. In the first years after 1989 the family also had a kiosk for fast food and ice cream located in the centre of Assenovgrad. To this day (July 2007) they kept one kiosk for sandwiches in Assenovgrad. This one was unfavourably positioned (albeit still in the town centre) and failed to attract as many customers, complained Nedka's mother-in-law. In addition for many years prior to the hotel, the family had managed a cafeteria in the village centre. The place was officially owned by the farming cooperative in the neighbouring village of Topolovo. Petko had arranged to lease it for a defined period (1990 – 2006). In this cafeteria I first met Nedka at the time of my arrival in Cherven in October 2004. Then she was serving the clients at the bar aided by one hired worker. At the same time her daughter Radka was already working in shifts at the family owned grocery shop at the central square.[78]

[78] The family had around 8 dekar of land deposited with the local cooperative. They hadn't been involved in farming or animal husbandry for a long time.

Given this family background it was no wonder that Petko followed in his father footsteps and became a private entrepreneur. Starting with a small grocery shop, Petko was soon driven to prove himself as a successful owner and manager of a hotel complex. Evidently this ambition was in part owing to the successful example set by the two other families.

Nedka remembered that in the first years after their marriage, she and her husband worked as cooks: Nedka had a job at a school canteen, and Petko – at the then modern hotel complex in Assenovgrad "Asenovetz" built in the early 1970s. Both had graduated from the school of public catering in Plovdiv. After graduation, Nedka continued specializing in food technologies for two more years as a part time student. She wanted to get this qualification and later work as a technological food expert not as a common cook. She confirmed that her training in public catering facilitated her present involvement in the family business. In fact the hotel/restaurant combination had allowed for an excellent application of the couple's professional expertise and experience (cultural capital).

When I asked her why they had considered having a hotel, Nedka replied that the grocery shop was not enough. Hence they desired to have and manage their own business complex including the grocery shop, restaurant and the hotel with 10 rooms (4 apartments and 6 double rooms). The construction of the hotel was financed through a series of mortgage loans. So far they had utilised two such loans. Nedka explicitly stated that the small business owners could not rely on state support. In her opinion the state not only did not assist but deliberately put obstacles to destroy family businesses.

To cope with the financial pressures Nedka and Petko kept only a limited number of personnel - one bar tender, one cook, one shopkeeper and two waitresses. They hired a woman to clean once in a while. Altogether credible people from the village were given priority in the process of personnel recruitment. Yet the increasing work piled on the backs of all family members. Thus Nedka regulated work at the restaurant at the same time as Petko organized supplies and managed construction work around the complex. The daughter, Radka, took shifts at the grocery shop. At the same time (2007) she studied marketing at Plovdiv University. The son Mitko, a recent high school graduate and university applicant, also participated in the family business helping his father. No one got a salary except for Radka. There were not many days off or summer recreation trips – a situation common to all three enterprising families. In this context balancing home and business duties was complicated. As Nedka clarified her mother-in-law regularly cooked while she and Radka cleaned and did the washing at home.

I understood that the family was still in the initial phases of establishing their business in comparison to their opponents. Nedka considered it was too early to contact tour operators and make arrangements to host tourists. Like Diana and Katya, she agreed that the area was favourable to the development of rural tourism, and pointed to other successful small enterprises in the locality. Their promotion strategy was based on price diversification. No other endorsement was possible for the moment. Then she brought to my attention the specifically designed firm logo printed on the paper napkins at the restaurant where the interview was taking place. This logo print was also a popular form of promotion specific for their family enterprise.

Asked about the relationship with the two rival families, Nedka confirmed the lack of partnership or any form of cooperation. She assured me of their advantageous position pointing to the extensive family experience in managing private enterprise both during socialism and postsocialism. In comparison the two other hotels running families dwelled on mere illusions. Here I need to slightly digress and add a few personal details to the picture of family rivalry. It was indeed true that the three families opposed each other in their market struggle for clients. Also it was somehow stunning to have three family hotels in a village of less than 1000 permanent residents. I could confirm that Diana and Mitko – the couple who first introduced rural tourism business in the village – were still treated as outsiders. Consequently the animosity towards them was justifiable in view of the specificities of social relations in Cherven. In contrast the two other couples (Peter and Katya and Petko and Nedka) both had extended social networks in the village and could use this form of social capital in propelling their businesses. At the time of my stay at the village I noticed that Peter's son Hristo dated Petko's daughter Radka. This romantic liaison was commented upon since it brought into question the rivalry between the two families. Thus my hostess remarked on the absurdity of this business opposition in the face of the growing friendship between what was deemed to be the successors to the business. Indeed in this case the two rival families consolidated their recourses and solidified their positions as the business/family conflict was ultimately resolved with the official engagement and the following marriage of Hristo and Radka in 2008.

To my question, "do you feel different from other villagers?" Nedka complained about village people envious of her family's success: these people did not give her any credit for her long working day (15 hours per day). Nedka made clear she was working very hard for her money, much harder than any member of the staff she hired. *"If I am not around, the job won't be done"* she stated. It was true that Nedka was regularly serving drinks in the

coffee bar and attending to guest at the restaurant. (In this way her level of involvement in the business was similar to Katya's.) Although Nedka was not explicit about her status, her comment about "envy" among common villagers indicated a process of social polarization. I also noticed the hostility towards the new entrepreneurial class in circulating gossips. The growing resentment towards the new business families was an indication of the sort of tensions that were arising between the "new class" and the others.

H. Alexandrov (2004: 157) insightfully exposes the fears of the new Bulgarian entrepreneurs in connection to being viewed negatively by the public:

> "However, there is an even deeper fear from the destructive envy on the part of the community and even the close family surrounding. Envy is the most primitive emotion of painful intolerance towards something good done or possessed by others. The good object is envied and hated for the very reason of being good. To protect oneself from envy one has to shield the good by presenting it as something bad, not worthy of being desired. It seems that the culture of survival and dependency institutionalizes envy as a basic mechanism of social control and regulation, steered against individual autonomy and prosperity. The intolerance towards individual success in an environment, dominated by group and familistic values, dooms the entrepreneur to alienation and exclusion from his former social milieu, unless he pays a ransom."

Being aware of this separation, Nedka tried to excuse her acquired status, making her position closer to Diana's - both of them emphasised hard-work and personal sacrifice. The reputation of a long-standing commitment to private enterprise in her family could partially explain this similarity as well. After all, Nedka regarded herself as more experienced and skilled in dealing with market affairs in comparison to the other two enterprising families, let alone when compared to other villagers. In contrast, Katya did not admit to having any special status in community but tried to downplay social distinctions. She obviously defied the envy of villagers by presenting her family business as unfavourable endeavour, resonating in her phrase *"even unemployed people live better than us"*. Hence Katya was behaving in the manner illustrated in the above quote from Alexandrov.

Overall I was impressed that none of the three women identified herself as an entrepreneur or a business woman openly. I did not hear a clear and explicit statement referring to class

position. By women's self-identification markers of "workings hard" and "personal sacrifice" I concluded that underneath was a process of social differentiation which ought to be explained and justified.

As a researcher it was intriguing for me to understand how Nedka's explanation of the family business corresponded to her daughter's reflections and experience in the same context. Basically for this reason I wanted to interview the 22 years old Radka as a representative of the younger generation of hotel owners/managers. I took the interview from Radka on the next day after I had spoken with her mother. It was the only recorded formal interview I managed to get from a "successor" to the business.

Prior to our formal interview I regularly met Radka whenever I went to buy food at her parents' grocery shop. She was there serving customers on a daily basis. As I mentioned earlier she was the only family member who got paid for her contribution to the family business. As far as I know such an arrangement was unique among all enterprising families in Cherven. Radka always appeared to be self-confident, mature and responsible. She greeted customers with nice smile and jovial attitude. Later during the interview I learned she had taken part in the family business from a very early age. Radka remembered to be only seven - eight years old when she assisted in the cafeteria in the centre of the village (the family had operated this business from 1990 to 2006). Then she performed different tasks - cooked, cleaned in the kitchen and served the clients. Radka continued participating in the family enterprise, working as a shopkeeper for 3 years now.[79] Her present obligations included keeping record of goods, monitoring expiry dates, cleaning and serving clients. Radka had only one assistant – a 40 years old woman commuting from a neighbouring village of Dolnoslav. The two of them worked in shifts even during weekends and official holidays. Notably Radka had one day off during the week.

When I questioned Radka how she felt about her role in the family enterprise, she replied with the simple sentence "we have to support each other". Radka participated in decision making on equal foot with her parents. If they could afford to hire more staff, the girl added, she would like to take up part of her father's obligations. In this case, he would be only responsible for organizing the supplies.

[79] The interview was done in 2007.

In the long run Radka managed to combine work with studies at the University of Plovdiv. In July 2007 she was a full time student in economics and business administration. When preparing for an exam Radka would arrange to work in the morning and so as to have a free afternoon for studying. She confessed to be moderately satisfied with her studies. Soon Radka would get a university degree in economics with a specialty in marketing. This knowledge now helped her dealing with state regulatory institutions – sanitary control for example. In addition she was able to get better orientated in trade legislation and other areas such as promotion and client service.

I asked Radka about her personal ambitions, not related to the family business. Then I came to know that she dreamt of having a corporate career as a manager in big companies such as Zagorka (Bulgarian Beer Company) or Coca Cola. In the same line, she would also like to be a trade representative of brands or work as a brand developer and create product series in marketing. Radka had other ambitions as well. She sometimes imagined having her own hotel located away from the village. Her hotel should accommodate no more than 10 guests and would resemble a vacation house with a traditional restaurant ("mehana"), kitchen and several bedrooms.

When I asked her why she would picture her hotel to be away from the village, she confessed her dissatisfaction with the village people: *"they are strange"*. In Smolyan (a town located in the area), she asserted, the people were much more open and generous. For me, her evaluation of villagers indicated the emerging gap between her family and their social environment. Radka assured me she was not spoiled or conceited because of her parent's business success but some villagers treated her badly which made her respond negatively. Radka boasted to have a stable circle of friends in the village who supported her. Some of her friends were poor and exploited young people - most of them worked hard to make ends meet. She did not differentiate herself from them but on the contrary - felt equal to them.

About the future of young people in Bulgaria, Radka said she justified the migration of young people abroad. Radka gave the example of one person who had graduated from two universities in Sofia. However he was unemployed for a long time and decided to migrate to the USA. There he lived for some time as a low paid worker but later was hired to work on a project at one university. Now he was earning well and worked on another project. According to her, in Bulgaria people with connections get better jobs with good salaries.

People with abilities but no connections stayed unemployed and were compelled to migrate abroad.

Radka explained that many of her colleague students worked in the USA or UK during the summer. She would also like to go but was afraid she could not be able to speak satisfactory English. In the autumn of 2007 she would start studying English in Assenovgrad. Radka had a computer with Internet connection at home. She used simple software applications – e-mail, skype, word processing program. He younger brother helped her with computer work. She estimated there were around 25 – 30 internet subscribers in the village. Before there had been an internet café, but it soon closed down.

On the topic of competition she stated that her father's restaurant was more of a tavern type while Peter's bistro was a real restaurant. Having this difference in mind, it was not a competition at all. By saying so, Radka made a remarkable effort to moderate the business rivalry taking place between the two families. Her attitude was in part owing to the fact that she was still dating Peter's son Hristo at that time. Hence she did not want to support the opposition but on the contrary wanted to reconcile the two sides of the conflict. As mentioned earlier, not long time passed before Hristo and Radka announced their engagement and coming marriage. In this way I would consider that the business and family confrontation was put to an end. Nevertheless these occurrences happened long after I had left the village; therefore I could not provide any evidence to back up this suggestion.

Conclusion

This chapter develops the important themes of the previous chapter associated with state reforms and their impact on the social and economic foundations of the village community. Generally the end of mass privileges (state support) in agriculture had led to land decollectivisation and cooperative liquidation all over the country. In Cherven farming was gradually devaluated as a favourable mode of economic engagement. In this new economic context state policies related to regional development of rural tourism propelled the business strategies of a few enterprising families. Hence their cumulative efforts resulted in developing the "economy of services" in a specific industry - rural tourism. As I have already demonstrated policies introduced by the state significantly reshaped social and family relations in the past. At present I need to take into consideration important political aspects – mainly the Bulgarian membership in the EU and its implications for the national economic restructuring.

My intention in this chapter was to illustrate the new economic trends in the village through looking at the three families who have started businesses in the service industry combining hotel/restaurant/café/shop. If in the previous chapter family and kinship networks are viewed as productive and redistributive networks (urban-rural aspect), in this chapter I explore their relevance in the sphere of family business. In this way I acknowledge the complexity of the family arrangement and its reflections on the transformation of the local economy.

The transition from collective farming to rural tourism in the village economy exposed other accompanying shifts – namely the shift from state to private forms of production and from collective to individual forms of ownership and management. The entrepreneurial spirit and individual achievements had distinguished the few families from common villagers. They had produced social interaction and tension not experienced in the past. Therefore another important aspect of the rural tourism was associated with processes of social differentiation and social (in) equality**.**

The establishment of the new market institutions, together with opportunities for private initiative resulted in new roles, discourses and practices. The rehabilitation of economic capital**,** along with forms of accumulating it made possible the emergence of distinctive social groups within society – one of them being the postsocialist entrepreneurs. Their activities are continuously viewed with suspicion by the public, mainly due to the ambivalent economic privatization of national industries. The image of the Bulgarian entrepreneur to this day remains blemished by alleged participation in corruption schemes, squandering of national resources, etc. In this context, the village entrepreneurs in Cherven have to cope with the existing negative biases and predispositions of their fellow villagers.

I have introduced rural tourism as a neoliberal trend in economic development and a substitute of socialist collective farming. Evidently the agents of this transformation– the distinctive group of the new entrepreneurs embodied different set of values (notable in individualizing practices and discourses) that set them apart from the mainstream village population. Hence in the analysis the tension between “individual” and “community” has been examined under the themes of social differentiation and status inequality. The same opposition could be considered in relation to social exclusion as emphasizing the individual rights (Anglo-Saxon approach) vs. community solidarity (French approach). The cases of the three enterprising families all exemplified individual-related approaches to social inclusion, achievement and prosperity.

My informants – the wives in the families, emphasized hard work and personal sacrifice to highlight and legitimize their privileged position in two of the cases. In one case (Katya) the same emphasis was used to downplay social distinctions and present a more socially acceptable image of the family. Various factors, including the legacy from socialism, influence local understandings of social distinctions. The differing attitudes also mirror individual life trajectories and strategies of adjustment. Kirsten Ghosdsee (2005) argues tourism was and continued to be the economic sector dominated by women in Bulgaria. She reveals how under socialism women employed in the sector accumulated important cultural capital (language skills, knowledge of Western cultures) that was revalued after the changes. The specific gender politics of the regime induced the specialization of women in tourism, resulting in skills and experience relevant to the functioning of the market economy. As major economic sectors of Bulgarian economy faced bankruptcy, tourism remained vital by generating new jobs. This sector had a solid legacy of both advantages and drawbacks from the past. The new private family based enterprises challenged the establishment in centralised tourism. Nevertheless the crucial role of women in tourism was reinforced by the new market demands. By making use of their skills, drive and motivation to succeed the women I studied were well suited to face the new challenges.

Because of the type of enterprise they were involved in (related to the tourist industry, in addition to being private and family based), these families, I argue, constituted a distinctive social group, separated from the mainstream village society through distinctive practices and legitimizing discourses. Yet there were important similarities and differences among them. The common feature of all enterprises was their familial basis which implies shared responsibilities among family members and mutual agreement on how business should be developed. All three families possessed forms of cultural capital revalued after the changes. There were also important differences among the families related to their different access to social or political networks within and outside the village and how all of them tried to legitimize and justify their distinctive status among other villagers. In general the economic capital was represented by the family enterprise; social capital was determined by relationships among the families and their surrounding in terms of status and privilege. Political capital was present in access to political power and legitimating in and outside the village.

Ultimately each one of the new privately owned and managed restaurants and grocery shops was maintained, and existed in marked contrast to the nearly abandoned building of the *chitalishte*, and the ramshackle premises of the cooperative. The postsocialist society has

developed new symbols of prestige and status, associated with luxury, comfort, and public service to the new rich. In contrast, the buildings and spaces associated with the communist reign like the *chitalishte*, for example, were gradually falling in decay. As tragic remnants of socialism, these places of public life were demonstratively neglected by state authorities and villagers alike. The opposite trend was observed by Kaneff (2004) in Talpa during socialism where the building of the local *chitalishte* was well maintained while the village church was totally neglected and left to decay.

In the past, the socialist state transformed the social space according to its ideology. Now in the new political and economic context (the ideology of the market economy) privately run family businesses are transforming the environment. These observations I could interpret as evidence of how the changes in state ideologies provoked immediate transformations of the public physical space. Thus Cherven was renovated and changed from being a farming community into becoming a socialized space of recreational tourism. In the next chapter I continue to examine how the new economic, social and political contexts influence community transformation as seen through two important village institutions – the chitalishte and the school.

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Chapter 5

COMMUNITY TRANSFORMATION OBSERVED THROUGH TWO IMPORTANT VILLAGE INSTITUTIONS – THE LOCAL CHITALISHTE (CULTURE HOUSE) AND PRIMARY SCHOOL

Introduction

The purpose of this chapter is to reveal other aspects of community transformation in two different periods – socialist and postsocialist. While comparing the two periods I attempt to identify the processes of inclusion and exclusion taking place at the community level. To illustrate these changes I closely review the two community institutions which in my opinion best exemplify the new trends of development – the local school and chitalishte. Through this case-specific approach I emphasize the general structure of the postsocialist transformation in the rural areas of Bulgaria.

Why do I take the chitalishte and the school as representative of community life during two distinctive historical and social periods? The "community" concept itself is complicated and controversial allowing for many interpretations (Rose 1999: 167-196; Delanty 2003; Creed 2006: 23-48; Bauman 2007; Gudeman 2008: 27-28). For my analysis I regard the chitalishte and the school as representative of community memory, joint initiative and collective activities. Both institutions were established through local initiative as community projects. Therefore in my view they best represent the "public face" of the local community as far as they were and still are the material reflections of local ambitions and efforts to actualize them.

While collecting information for this chapter I looked at historical documents to reconstruct the past existence of these institutions. I compared their past to their present in an attempt to reconstruct social relationships developed and still re-enacted around these two community centres. As much as the chitalishte and the school share a common space within the village, they become differentiated by their past and present functions and degrees of importance to the community. In my analysis I try to establish the common features of the two sites and see how much they differ from one another in ways that provoke community transformation.

In this chapter I am also concerned with the level of state involvement, as much as the state had remained the dominant factor reforming rural communities. This ongoing process of transformation has previously involved collectivizing agriculture and industrializing the countryside in correspondence to the dominant socialist ideology. Having undergone various reforms, the rural areas, gradually depopulated and lost in the competition for resources to urban centres by the end of the socialist period. During postsocialism the trend of imbalanced regional development had remained as one of the major inequalities of the postsocialist era. In the recent years, the marginalization of the rural areas had been evident from limited infrastructural investment and massive unemployment.

In his analysis of the ways the community is reshaped after "the crisis of the welfare State" Rose (1999: 174-175) writes:

> "Organizations and other actors that were once enmeshed in the complex and bureaucratic lines of force of the social state are to be set free to find their own destiny. Yet, at the same time, they are to be made responsible for that destiny, and for the destiny of society as a whole, in new ways. Politics is to be returned to society itself, but no longer in a social form: in the form of individual morality, organizational responsibility and ethical community."

After the changes in the political system in 1989, the Bulgarian state had embraced a new ideology of economic development – a sort of neoliberalism, advocated by the West (Bourdieu 1998; Harvey 2005; Johnson D., and Saad-Filho 2005).[80] In the new paradigm of development, privatization of industries and decollectivisation of cooperatives provoked discontent and uncertainty among the rural population. The subsequent restructuring of the village community reflected all the reform processes triggered by the state. In this context the historical evidence from the two important village institutions – the chitalishte and the school would provide some insights into how the new ideology of decentralization has affected the community, and in addition which were the new forms of inclusion and exclusion provoked by this policy approach.

[80] I will base my understanding of neoliberalism on the following definition: "(Neo-liberalism) includes formal institutions, such as minimalist welfare-state, taxation, and business-regulation programs; flexible labor markets and decentralized capital-labor relations unencumbered by strong unions and collective bargaining; and the absence of barriers to international capital mobility. It includes institutionalized normative principles favoring free-market solutions to economic problems, rather than bargaining or indicative planning, and a dedication to controlling inflation even at the expense of full employment. It includes institutionalized cognitive principles, notably a deep, taken-for-granted belief in neoclassical economics (Campbell & Pederson (2001: 5) cited in Bandelj (2008: 47))."

Hence during fieldwork I considered it essential to collect information about the local school and culture house (chitalishte). I imagined these places to be important community sites. What was their relevance in constructing and maintaining the village community in the past? How does the new social and political order influence their development as community centres today? During my interviews and observations I was about to discover how much meaning was attributed to these sites and who were their main supporters and beneficiaries.

The Chitalishte: Past and Present

> "In the Chitalishte, the community is no longer perceived as a sociological abstraction, but is transformed into a reality of human experiences. It is a place where people exchange their personal knowledge, share their worries and receive advice and support. Through the relationship between the people of a block, village, or neighbourhood, through the encounter with other denizens of the social space, the community acquires a human dimension and integrity. The Chitalishte is the only institution where people can realize for themselves whether the community they live in is in a good state, as well as get an immediate impression of its problems and achievements, and feel party to them" (UNDP 2000: 7).

Since 1964 the chitalishte in Cherven occupied a building in the central square of the village. This building, still standing, looked very impressive in size. It was located along the main road, dividing the village into two halves. Just across the road, opposite the main chitalishte building was the administrative building where the Mayor had his office. In front of the chitalishte there was a stone monument that embodied the revolutionary spirit – a typical theme of so many similar memorials built during socialism.

The building of the chitalishte was well equipped to house clubs and social activities during socialism. Inside, on the ground floor, there was a large auditorium with a big stage where movie screenings, concerts, theatre performances and other communal celebrations took place. Now the auditorium looked empty and neglected. Overall the premises were in a bad condition and necessitated serious repair. The dusty empty rooms on the ground floor once used to accommodate various clubs suggested to me that it was a long time since any significant social or cultural activity was carried out.

In this section I will describe and analyze my findings about the local culture house. In my description I refer to information collected form the chitalishte librarian – a woman in her mid 70s who had spent all her life in the village. I will call her Ana. She was in charge of organizing many of the events taking place in the chitalishte during the socialist period. At the point of my arrival and stay in the village, she still occupied the position of librarian, taking care of the small library – the only functioning unit in the culture house.

Ana had worked in the chitalishte since 1970. For a long period she had combined several functions – librarian, secretary and chair of the Fatherland Front.[81] I've also seen her helping with administrative work in the local school. I did several interviews with Ana. She was a crucial source of information about the chitalishte since she had served as an important functionary to this village institution under socialism and after. In the library archive Ana had kept a written history of the village (unpublished manuscript) and photos documenting events from the village community life. According to our earlier agreement I used to visit her during her working hours in the library. At that time I usually saw pupils from the local school coming and looking for books, often from the list of required readings for literature classes.

From my conversations with the librarian I came to know facts concerning the chitalishte history. The origin of the chitalishte could be traced back to 1926. From its inception it was named after the popular Bulgarian revolutionary and poet Hristo Botev. Back then it housed a library and public lectures and meetings were often held in the building. According to another source, the unpublished manuscript of the history of Cherven, written by Vassil Pop Vasilev (he served as a teacher in the local school during the socialist period) the first theatrical performance was organized in 1924. It was in this year that Vasilev took part in the event while he was a young teacher in Cherven. Although the manuscript was not dated I assume that it was written in the early 1980s. Vasilev wrote that the founders of the chitalishte were the local teachers. Initially the chitalishte was housed in a private dwelling and had a limited number of books.

[81] The Fatherland Front (FF) (Bulgarian: Отечествен фронт) was created on the initiative of the Bulgarian Communist Party in 1942. During socialism it was a significant political mass organization propagating communist ideology.

A brief notice in the local newspaper *Rodopsko Eho* from February 9, 1927 also informed about the chitalishte initiation in Cherven:

> "Our village has long experienced the need for a chitalishte. As a result of teachers' initiative on December 19 last year (1926) a general village meeting was held to discuss this issue. The outcome surpassed all expectations: forty people signed up as founding members. Voluntary contributions for the chitalishte reached 5000 BGN. Donated were many books. Having done so, the villagers provided yet further evidence of their progressive and study-loving attitude. From the first day of Christmas the reading room was open. All members eagerly and frequently visit the reading room."[82]

This newspaper announcement confirmed the founding year of the chitalishte (1926) and acknowledged the leading role of the local intelligentsia (the teachers) in its inception. Still this notice testified to the common acceptance of this institution in the village and the symbolic meaning attached to it as a progressive and all- inclusive endeavour.

I was interested to know more about the current financial situation of the chitalishte. According to the latest legislation passed in 1996, the chitalishte was no longer a state cultural institution and for this reason was no more exclusively supported by the state budget. Its new status was defined as a civil society organization (NGO). In this way the chitalishte was entitled to receive state or/and municipal subsidy but could also have other sources of revenue (Zahariev 2008: 4). The librarian Ana explained that according to the same legislation, the culture house was granted 30 decares of municipal land.[83] This plot of land was rented to the local cooperative and annually provided an income amounting to 390 BGN. Other sources of income for the culture house included an annual membership fee from 87 readers (app. 100 BGN). Nevertheless, like many such institutions in Bulgaria, the culture house in Cherven mostly relied on the annual municipal subsidy. The expected municipal subsidy for 2004 was estimated at 2 245 BGN. The project budget for 2005 was 3 315 BGN. This amount of money was certainly not enough to maintain and update the facilities (e.g. improve accommodation and facilitate access to updated information sources). The Bulgarian state has acknowledged the need for providing more funds for modernizing the chitalishte (Zahariev 2008: 8, 16). Hence each year additional subsidy from the state budget is allocated (e.g. for 2005 it amounted to 150 0000 BGN). To receive some portion of this subsidy the

[82] *"Родопско ехо"* (Rodopsko eho), issue 103 (09.02.1927)
[83] This plot of land was of poor quality.

chitalishte had to file a project application. Unfortunately, according to the librarian Ana, the local culture house did not have any organizational capacity to file an application or participate in projects.[84] There were no modern facilities – computer, fax machine, and most importantly – no trained staff available in the village. Thus applying for additional state subsidy was not an option for the chitalishte in Cherven, at least for the time being.

The building of the chitalishte was still considered municipal property as was the case with 95% of all chitalishte buildings in Bulgaria (Zahariev 2008: 15). By law this property was granted to be used and maintained by the local chitalishte management (board). Generally maintaining and updating the facilities was a difficult task to accomplish in view of limited subsidies and other revenues. In Cherven the problem was even more complicated: renting out the empty rooms required a municipal permit. This condition made the procedure difficult to complete. As a result the rooms of the culture house stood empty and dusty. In the case that these rooms were rented, the money would be absorbed in the municipal budget, as only a portion would have remained in the village. Such centralization, therefore, obstructed available options for development in this case of neglected property.

In this relation, the village Mayor told me that his administrative rights were strongly restricted. As a consequence all important decisions concerning Cherven were taken at municipal level. This arrangement, the Mayor complained, impeded his work in resolving problems in the village. In this context, he also mentioned: "*The state is no longer there, the state ceased its existence.*" Interpreting his words, I suggest he meant that the postsocialist state (in tacit comparison with the socialist state) was in deep crisis and could not come to grips with the problems of society. At the same time, the centralization of authorities hindered local responses and initiatives for development. At a more abstract level, I could interpret his words as related to the state being absent from the community even though state control is enforced from further up the administrative hierarchy. Sadly the Mayor as well expressed his inability to resolve the case with the collapsing building of the culture house. Somehow it stood as a tragic monument of socialism – a relic serving as a reminder of a vanished vision of community from this period.[85]

[84] In their analysis, Narayan and Pritchett (2000: 286) give the following definition of organizational capacity: "Local organizational capacity is the ability of people – in their desire to achieve agreed-upon goals – to work together, trust one another, and organize to solve problems, mobilize resources, resolve conflicts, and network with others (Narayan 1997)."

[85] I recognize the problem of associating the chitalishte exclusively with the socialist state. I acknowledge that the local chitalishte is a pre-socialist organization. However, in the memory of my informants its activities were related to the socialist period. For that reason, I associate the chitalishte and the events it housed with socialism and the way community was structured by the socialist ideology.

In 1988 the building was renovated for the last time. Since then no further attempts were made to preserve this institution. During socialism villagers were able to see folk concerts, film screenings, sport events (table tennis), theatre performances and participate in parties and celebrations. At present this range of activities was no longer affordable with the meagre resources of the budget. The last efforts at preserving some forms of communal activities were the pensioners' club, a dance school for young children and an English language club intended for small children. Regrettably, none of these activities based at the chitalishte lasted for a long period. The pensioners' club existed for only a few years after 1989. During my stay at the village (2004/2005), I did not observe any cultural or social event taking place in the chitalishte except the pre-election campaign visit of the MP candidate nominated by the Bulgarian Socialist Party.

Nowadays only the library still functioned while all other forms of cultural or educational activities were gradually marginalized and terminated. From 1981 until 1996 the library was entirely subsidized by the municipal budget. In this period, the library stock of books and magazines were systematically maintained, as orders from the village librarian were delivered after being centrally approved in Assenovgrad. These details about the functioning of the library in the past characterized to a great extent the workings of the centrally planned economy under socialism. After 1996, however, municipal subsidies were drastically cut and today the budget of the culture house was only enough to cover expenses related to electricity and the salary of the full time staff – in this case it was only the librarian. The library stock had not been regularly updated since 1996. In this critical situation, the librarian Ana welcomed donations from readers for purchasing a limited number of books. She mentioned that some villagers donated old books from their personal libraries. Ana kept statistical information about different categories of library members. Apart from the considerable number of pupils from the local school, the library was frequented by many pensioners – a situation typical for small village libraries in Bulgaria (Zahariev 2008: 17-18).

My findings about the chitalishte ultimately pointed to a general decline in cultural and social life in the village. Paradoxically villagers, who had invested their efforts in building the culture house, did not have a say in determining its destiny. It was interesting to take notice of the intersection between community and generation. My impression was that a sense of

loss associated with communal activities taking place in the chitalishte was mostly experienced by the middle and older generations.[86]

Chitalishte and Community Transformation

The building of the new premises of the chitalishte in Cherven was a *communal project* as villagers contributed free labour and donations. In her field site, the rural settlement named Talpa, D. Kaneff (2004) also observed how community sites such as the local church, school and chitalishte were built with the help of donations and labour contributed by locals. Kaneff argued that "the shared nature of village labour is a central dimension of rural relations" and that "rural work" constitutes a central part of local identity" (Kaneff 2002: 181). In my village I suggest community sites could also be considered as significant markers of local identity due to the symbolic meaning of "work" as a practical activity entangling people in a complex set of social relationships.

The American ethnographer Irwin Sanders (1949: 158-159) described how the local chitalishte in the Bulgarian village of Dragalevtsy was organized by a few returnees to the village who desired "to raise the cultural level" (ibid: 158). As written in the constitution the general objectives of the founders were: "to influence the people of the village, especially the young to self-improvement; to cause to grow among the people a feeling for public unity in life and for intelligent usage of the village domain; to cultivate love towards the fatherland and towards the good and morally edifying elements of the national literature" (ibid: 158). These general aims pointed to three distinctive targets: first, facilitating *individual* potential development, second, fostering *community* solidarity (termed as "public unity" and "village domain") and third, inspiring loyalty to the *nation-state*. I have purposely outlined the key words notable in the text: *individual, community* and *nation-state* as all three elements were represented and blended together in the cultural and educational events at the Bulgarian chitalishte. Sanders explicitly emphasised: "The Chitalishte group also planned to organize

[86] Youngsters from the village had prioritized other places for informal get-togethers with peers. One of their favourite locations was a run-down restaurant situated along the main road, close to the village centre. This restaurant, today ram shackled and badly maintained, had outlived its reputation of being a popular place of entertainment visited by locals and outsiders. The past glory vanished as once the modern disco turned into a scene of drunkenness and violent misbehaviour. Today the village youth gathered to drink coffee and soft drinks very often outside if the weather permitted. During New Year's Eve, the place was a setting of a big celebration as youngsters arranged the menu of the evening. I noticed how they organized themselves to help the owner of the restaurant with cooking the meals, cleaning and decorating the place. I was also invited to spend the coming of the New Year in their company. Another favourite place where the young people from the village often went was a hunters' cabin located up in the mountains. Usually hunters from the locality spent nights there when hunting during weekends.

evening lectures and other public performances and entertainments 'in order to create a patriotic feeling and appreciation of the nations past'" (ibid: 158). In both ethnographies cited above I could find similar explanations of how the chitalishte helped structure a village community – one important element was related to endorsing loyalty to the nation-state. In this way the chitalishte not only strengthened bonds and relationships within the village community but also made villagers aware of their common belonging to the nation, an abstract community beyond the boundaries of the village.

One of the important functions of the chitalishte was to popularize literature and disseminate knowledge especially among rural inhabitants (Kaneff 2004: 159-160). (The etymology of word *"chitalishte"* can be traced to the Bulgarian verb *"cheta"* ("to read"): hence at the core of every chitalishte was the library.) Similarly Kolev (2002: 166) considered the chitalishte to be an institution for disseminating information and an "incubator" for reproducing values of cultural significance. Thus Kolev recognized the contribution of the culture houses for facilitating the social and cultural integration of people living in small villages - a community site that served to bridge the gap between urban and rural areas in terms of providing easily accessible training, education and cultural entertainment. In this way the chitalishte combined the functions of separate cultural institutions in urban centres: public library, town theatre, cinema, and musical and language schools. In 1927 the first legislation regarding the chitalishte was passed and shortly before the World War II their number in Bulgaria reached 3700 (Sirakov 2000: 674). In comparison, in 2005 according to official statistics the culture houses in Bulgaria were 2 838: 539 located in urban areas and 2 299 in rural.[87] In 2008 they increased to 3371.[88]

My hostess Rossi, a representative of the middle generations, remembered the local chitalishte as being associated with cultural events and celebrations that brought villagers together during socialism. I could sense the nostalgic overtone in her description of activities carried out in the chitalishte, among them were many public holidays related to family, motherhood, children and women. Rossi mentioned that in the past such holidays (e.g. Women's day internationally recognized on the 8th of March) were publicly celebrated in the chitalishte. Nowadays, the same holidays are driven out of the public space represented by the chitalishte and are restricted to the private space of family, close relatives and personal

[87] Source: National Statistical Institute: http://www.nsi.bg/SocialActivities/Culture.htm
[88] Source: The Bulgarian Ministry of Culture (Национален регистър на народните читалища): www.chitalishte.mc.government.bg

acquaintances. This change in recent decades I construe as a major shift in how community was constructed and maintained during socialism in comparison to postsocialism.

One example of a communal celebration from the socialist period best illustrates this point. The librarian Ana told me about a special village celebration initiated by the chitalishte. Then she was an active participant in the organization of this special event. The secular holiday had to be introduced in the village community as a substitute for the traditional village celebration linked in the Orthodox calendar to the day of the Holly Virgin, 15th of August. The new socialist holiday was named *"празник на рода и семейството"* ("the holiday of the kin and family"). For the first time, this holiday was officially celebrated in 1988. The Mayor and the secretary of the chitalishte Ana opened the event. During the festivities various performers and musicians entertained the public. The award ceremony was the key moment of the event. The Mayor awarded chosen residents of Cherven: the youngest and oldest of all villagers, married couples celebrating their 50th marriage anniversary, mothers with three or more children. The festivities took place on the central square until very late in the evening, accompanied by live music, dancing, eating and drinking. I saw photos from the first edition of the holiday. On these photos posed the Mayor honouring the selected group of villagers.

This invented holiday was an attempt at "institutionalizing" the traditional village celebration by placing it in the formal framework of the chitalishte and associating it with local authority figures (e.g. Mayor). This formal event was situated in a public space, undoubtedly structured and controlled in accordance with the prevailing state ideology. Emphasizing family and kinship groups, the organizers most likely sought after popularity and mass participation. The annual meetings of distant relatives belonging to one kinship group was and still is one of popular forms of communal get-together in the Bulgarian villages. Today such meetings are carried out without the involvement of state institutions.[89]

After the political changes in the early 1990s, local tensions and disputes interrupted communal celebrations in the village. For several years the village holiday was not celebrated at all. Only in recent years, the tradition was resumed independently from the chitalishte. Hence, I was present at the celebration of the village holiday on the 15th of August in 2005. This time the village holiday was re-established as a religious and family holiday since a special church service was held in the morning. After attending the church, villagers went

[89] For a discussion on socialist public holidays in Bulgaria see D. Koleva (2007).

back to their homes to enjoy the specially prepared meal: on this day many families in the village had prepared lamb and invited friends and relatives to join them for the festivities. In the evening, the village central square was full of people. Hired musicians came to play music. However the pouring rain thwarted the open air celebration. The villagers soon sought shelter in the centrally located restaurant of Peter Tochev. There all tables were reserved for guests far in advance. Inside the restaurant I could see how people enjoyed food and drink in the company of their families and friends.

As this case demonstrated during socialism the chitalishte was at the core of a public representation of the village community. There social participation and inclusion was carried on through shared activities. In addition, my interpretation of the emphasis my hostess Rossi put on communal activities (communal celebrations, art exhibitions, theatre performances, movie screenings, sport events, participation in interest groups and clubs) would be linked to the idea of how community was experienced during socialism and how the many types of activities in the culture house helped establish and perpetuate a sense of "egalitarian" community.

Further on I assume the nostalgic attitude in my hostess' comments signified the experience of a great loss induced by the breaking up of this supposedly "egalitarian" community during postsocialism. I use the term "egalitarian" to describe the village community in the socialist years in order to emphasize how accessible all community-related events in the chitalishte were. Participating in clubs (e.g. local folklore group) or attending performances did not require major investment on the part of individuals or families. In this sense, access to participation in various social activities did not depend on income or social position (class). In addition participation did not depend on political affiliation, gender or age. Therefore, the chitalishte indiscriminately brought together members of the village community and provided the basis of social and cultural interaction during socialism.

In contrast Rossi complained about the growing alienation in the local community. She blamed poor economic conditions (unemployment, inadequate incomes, and general social insecurity) on the disappearing solidarity among people. Nowadays, Rossi claimed, villagers limited their social contacts and did not share as before. Indeed as noted in the previous chapter the growing disparities among families induced a sense of resentment towards the new rich in the village – the local entrepreneurs.

Another informant, Nenka (I introduced her in Chapter 1 (methodology section) and Chapter 3 - in relation to cooperative farming during socialism), also confirmed the greater community cohesion and solidarity during socialism: *"people were equal – there were no rich or poor"*. Today, Nenka noted, everyone was forced to survive individually while during socialism people worked for the common welfare. Then villagers shared among themselves much more. There was no envy and resentment between families because people felt secure in their employment and incomes. Working hard, they could afford to improve their living conditions – building and furnishing a house.[90] Solidarity was widespread in these days, and Nenka pointed to communal celebrations organized in relation to religious holidays of paying homage to popular local saints St. Iliya and St. Panteley.[91] Villagers would also get together to share meals and celebrate during official state holidays – 1st of May and 9th of September (on this date in 1944 the Communist Party officially took power in Bulgaria). Even before the establishment of the chitalishte, the locals saw movie screenings projected on the outside walls of the building which was now the restaurant of Peter Tochev. These screenings took place every Saturday and then villagers brought small chairs from their houses to sit on.[92]

In Cherven I met a couple of pensioners, Mitko and Filka, who were active participants in the local folklore group in the chitalishte during the socialist period. I will describe them in more detail because they turned out to be among my most important friends and informants in the village. Their household was observed in the framework of the Household Budget Survey taking place in the village. I met them during the habitual rounds accompanying the representative of the survey. They had one son, also residing in the village with his wife and daughter. He had recently finished the construction of his own separate house not far from his parents' place of residence. The son had financed the new house by borrowing money. His family was also part of the sample in HBS, treated as a separate household. Mitko and Filka had also one daughter married in a small north eastern town. They often spoke about her and their grandchildren during our meetings. I befriended them and we become really

[90] The symbolic meaning of "working hard" is examined more thoroughly in the next chapter on social security.

[91] Despite the notable history of Communist leadership in Cherven, Stefan Tochev claimed that church attendance had never been banned or persecuted. Under socialism the local priest was said to be among the most loyal supporters of the cooperative idea. Religious activities (e.g. communal celebrations, chuch attendance during major religious holidays) were to this day part of the commual life in the village.

[92] There was one amusing episode surrounding the building of the chitalishte in Cherven. Nenka came to the village in 1959 to work in the newly estblished veternary station at the cooperative. The same year, she remembered, to Cherven came the head of the state Todor Zhivkov. Before the welcoming crowds Zhivkov addmitted how pleased was he to be among these hard-working people. Zhivkov then announced the forthcoming building of new public buildings and apartment blocks in the village. There was a wisper in the crowd resonating his word "apartamenti" (aprtments) as "menti, menti" (*menti* is a slang word for "lies" in Bulgarian). This response provoked general exitement and applause. Nevertheless, after the official visit the builiding of the chitalishte was commenced in the central square.

close friends as they often insisted on inviting me to their house for a dinner. In our discussions they often shared memories about their lives during socialism. Mitko was an amateur musician in the sense that he did not receive any professional training. He played the accordion very well and had been part of popular folk bands during socialism. Then he vividly remembered travelling around the country to play at weddings and other family celebrations in villages. In these days most villagers organized lavish celebrations and invited musicians to entertain their numerous guests: *"Back then the people had money and there was plenty of work for us (the musicians). I used to play every evening. During the day I played at the restaurant and in the evenings I went to entertain at a family celebration. I was away from home for 13, 14, 15 days. People had money then and invited as many as 200 – 300 guests."* Because of these frequent engagements, his informal occupation earned him a considerable income apart from his formal engagement at a recreation facility. At that time his wife Filka worked at the local branch of a significant plastic-producing enterprise located in Assenovgrad. The enterprise is called "Assenova krepost" and during socialist times it was one of the major employers in the region. She told me how secure and satisfied she felt having this employment. Workers were entitled to numerous benefits such as paid vacations, bonus payments, and presents for the New Year and the Women's day. She contrasted her "privileged" status then with the unfavourable working conditions of her children today – work overloads, stress, uncertainty about the future.

For many years Mitko was the leader of the local folklore group. He was in charge of rehearsals, public performances and participation in local competitions. Filka was singing in the same group. I saw them posing among other participants in the photos of the group – musicians and singers – dressed in traditional costumes characteristic for the village. When I asked why the folklore group did not continue its existence nowadays, Mitko explained how busy people were trying to make ends meet, having to work at multiple jobs. Under such conditions, public life in the village was less and less concentrated in the chitalishte.[93]

[93] At present, other forms of communal get-together and joint activities had persisted over formally organized events and activities at the chitalishte. These forms of shared participation I could observe during interaction with villagers. Hunting in the nearby mountains was very popular among the male population in the village: there were about 20 officially registered hunters. They traditionally organized a shooting competition in May. My host Iliya and his younger son were also keen hunters and very often during weekends went out with fellows in the mountains to chase pray. Another popular form of networking and sharing was collecting doves. This hobby was common among the young boys and male adults in the village. The dove keepers had their own network stretching beyond the village and socialized often to discuss, compare and enjoy their pets. I think this hobby was also useful in keeping alive social contacts among male villagers in the same way as growing flower pads in gardens was for women. Motorcycling was also quite a popular form of local entertainment. Each year in March rockers from all over the country gathered at the nearby Bachkovo monastery to attend a special church service dedicated to the opening of the season for motorcycling.

Diminishing solidarity, participation and sharing among villagers noted by my informants could be seen as aspects of community disintegration – individual lifestyles and identities (individual strategies of adjustment/accommodation) had replaced collective/group identities derived from the participation in the community-related activities. According to S. Gudeman (2008: 32) the identities could be understood and constructed in relation to community: "Through affiliation, people constitute one aspect of their identity. I have termed this relational identity of the human the 'person-in-community', in contrast to the 'individual'." In this line, I am more inclined to argue that the case of the chitalishte is not indicative of community fragmentation, but it is rather a process of renegotiation of identities and renovation of lifestyles ultimately leading to community transformation.

The School History

The tradition of schooling in Cherven dated back to the age of the Ottoman Empire. The old school, I found still standing in the church yard. This construction looked like a small village shed and did not give the impression of some historical importance. However, as I was about to find out, the Mayor mentioned it during our conversations and assured me that he would initiate a renovation project as soon as possible. Still to me the presence of this relic signified the importance attributed to education, dating many ages ago.

From the local history written by the teacher Vassil Pop Vasilev I came to know how and when the school tradition in the village originated.[94] According to this historical representation, offering no specific context or dating, villagers who went to trade in the nearby town of Assenovgrad became aware of the advantages of literacy after having seen books with pictures and words. As a result, they had a desire to experience themselves this "miracle" of knowing to use the written words. So far villagers only used simple notation of marks to record their credits. Trying to place this representation in time and space I could offer the following specifications: villagers who traded in Assenovgrad became aware of the economic advantages of education after seeing more skilful tradesmen at the town market. Probably the author of the source referred to times prior to the Bulgarian liberation from the Ottoman rule. A stimulus for opening the school was also the consideration about the "future of the children". According to this historical source, the school was opened around 1870 – two or three years before the tragic end of the famous Bulgarian revolutionary and national

[94] This written source is the unpublished manuscript by Vassil Pop Vasilev.

hero Vassil Levski. Local people knew that once during a visit to the village, he spent the night in the school.

Initially the school was located in the church yard after a group of villagers whose names were mentioned in the records organized to build the premises. Next a teacher from another village was hired. During this period the school offered instruction in writing and basic arithmetic operations to boys from the village.

After ten years of existence, the school needed new accommodation due to the expanding number of pupils. Once again a group of enterprising villagers took the initiative to build a new more spacious and comfortable building. Then the state took over the financial support of the growing number of teachers. In a fire the new building burnt down in 1907 and the classes resumed in a private house. At that point funding and construction of new premises was again initiated. It is worth emphasizing that initially the project of organizing school activities was a local affair. The successful completion of this project reflected the great value attributed to education as people from the local community realized how knowledge would help them become more competitive at the town markets.

This historical representation of school traditions in Cherven confirms Sanders' observations:

> "There is compulsory education to the fourteenth year in Bulgaria. However, the law is seldom invoked because the parents have recognized the economic value of education. That is why Bulgaria is the most literate country in the Balkans, a testimony to the high value the peasants place upon education and the rigid school control at work in the compact villages. If some poorer peasant wanted to keep his children home from school he would have to face the withering scorn of his neighbors" (Sanders 1949: 270-271).

I cite Sanders in confirmation of my argument that school education in Cherven was highly esteemed by local people who realized the importance it held for the future of their children.

The school records were regularly kept and up-dated after 1911/1912. In 1920/1921 the school was transferred to the central square in the building which now housed a newly developed restaurant/hotel. In 1935 these premises were expanded following a special royal decree in order to accommodate pupils from the neighbouring villages. I met with the present school Principal several times to discuss the history and present day development of the school in

Cherven. The Principal – a woman in her early 50s – was commuting from Assenovgrad to attend to her duties as a director, manager, and teacher in mathematics. She did not have any family/kinship connections in Cherven but admitted she was eager to accept the position of school Principal in the village after successfully competing for the announced vacancy. From our conversations I came to know that the school had been once again transferred to its present location (not far from the village central square) in 1970. In this year the construction was finalized and the new premises opened for use. The new location of the school marked a special anniversary – 100 years of uninterrupted tradition in teaching and education in Cherven. As I mentioned before in the memories of old villagers the school existed in 1870. [95]

I was granted permission to look at the old school archives. I looked through albums with biographical information and photographs of the first teachers in Cherven. The Principal also showed me the records of school events and other memorabilia kept since 1970. Looking at these historical records made me aware how a model of a distinct village community was constructed around the school and how much it meant for the people still engaged and working in this important village institution. The detail and scrutiny with which school records were kept testified to the value of memory in preserving the school as a community-based and spatially defined institution where nonetheless teachers and pupils from other towns and villages in the region could get together and communicate. In that sense the school was a means of transcending locality along with the constraints of the immediate environment but provided the settings for meeting and embracing outsiders, thus creating a specific sense of a diverse village community.

I visited the school several times. The teachers I met during these visits projected the idea of a well working team. All of them were commuting from Assenovgrad and Plovdiv to the village to teach their classes. My impression was that the Principal worked closely with the teachers to maintain the positive spirit and upgrade the level of training both for the teacher and pupils. It is worth emphasizing that in 10 years after the foundation of the school in 1870, the state took over the responsibility of paying the teacher. Therefore, originating from a locally sponsored initiative, the school had become a national project. In the sections that follow I try to develop the idea of the local school being part of a national project. I exemplify how

[95] In 2000 the school celebrated its 130 anniversary. The president of the state, then Peter Stoyanov, was invited to attend the ceremony. Excusing himself, he sent a special address to congratulate the students and teachers.

education policies directed by the state affected local community transformation with regard to the new challenges posed by the globalization. [96]

Present Problems and Developments

Historical records stressed the importance of education to the local population. The history of the school further testified to the extent of efforts invested in maintaining this vital tradition. Nowadays the school tradition in Cherven was threatened. With less and less children willing to pursue their primary and secondary education in Cherven, the school had only a small chance of continuing its existence. The new government regulations demanded a minimum number of students in order to confirm the necessity and preserve schools in rural areas. All over the country many village schools were closed following budget reductions. Migration and declining birth rate of rural residents explained these closures.

Since 1995 the decreasing number of pupils following a trend of reduction in village population in Cherven had compelled the introduction of a new practice in teaching and education. The practice was manifested in organizing mixed classes where children from two different grades studied in one room together. At present this practice continued to exist since the number of pupils was slightly over 60-70 – very close to the critical minimum. According to the Principal the school was in danger due to this trend of reduction. She further explained to me that the uncertainty around the future existence of the school had repelled potential sponsors.[97]

In 2004/2005 the school had to pass through another critical period. The Principal explained the lack of students with the demographic crisis in the country, mainly the great decrease in births since 1997 – the notorious year marked with extreme rise in inflation and prices. Now this negative tendency in family reproduction was reflected in reducing school facilities mainly in rural areas.

Another reason for closing schools was the greater options available to parents to choose a school for their children. These greater options corresponded to higher mobility reflected in practices of commuting or changing residences. In the past these opportunities were

[96] Historically this educational institution in Bulgaria would serve the purposes of the nation state building, with programs and organizational frameworks intentionally designed to promote a sense of belonging to a homogenous Bulgarian nation in close reference to socialist ideology.
[97] In our last conversation in October 2005, the principal assured me that the municipal authorities were in favour of protecting schools in rural areas.

restricted and people had troubles switching schools with no sufficient reason. The greater liberties of parents (and children) meant that some of the school facilities would no longer be cost effective to be sustained by the municipal budget. In this context, the Principal regarded parents as *"not mature enough"* to make decisions. She was convinced that children should study at the place of their residence.

I had the impression that still many of the young parents in the village preferred having their little children in the local school. It was a matter of convenience not so much of financial consideration. Young children were more likely to study in the village since travelling to the nearby town every day was not a good option. Grown-up students were more likely to switch schools going for "better options" in the town if such ever existed.

Despite the fact that I did not witness any open opposition between parents and teachers regarding choice of school I sensed the anxiety of the Principal while talking about the destiny of the school.[98] In my interpretation losing the school along with the chitalishte would radically transform the identity and profile of the village community. Considering the number of hotels and pubs already operating or in process of construction as well as the growing numbers of villa owners partly residing in the village, the community would be converted into a leisure centre where consumption and service to the new rich would prevail. In this context local inhabitants would experience the increasing influx of outsiders who prefer to switch settings during weekends.

I attended the celebration marking the end of the school year at the end of June 2005. Eight pupils got their diplomas after successfully finishing their primary education there. The Mayor was among the special guests invited to attend the closing ceremony. He addressed pupils and parents wishing them success and good luck. During the interviews I did with him the Mayor showed his concern for the school although I could not discern any active involvement on his part with the school affairs or school projects. At the end of the ceremony, the Principal announced the start of a new project in the school – the introduction of computer training in 2004/2005. Her announcement was accepted enthusiastically by the audience of parents and children. Undoubtedly her energy and enthusiasm were the crucial factors bringing this project to a successful end. As I regularly met her in the school (or

[98] Unfortunately, the school was eventually closed down for the coming 2008/2009 year.

sometimes accidentally on the streets) she kept me informed how the project developed and what still needed to be finished. [99]

The School Project

> "First, the world in which we live is not a stationary one; it is changing – often quite rapidly. For example, the forces of "globalization" are bringing new groups of people into economic, social, and cultural contact with each other. Globalization is both a threat (especially to traditional ways of earning and living) and an enormous opportunity (especially in providing new ways of being prosperous and affluent). The ability of people to use the positive prospects depends on their not being excluded from the effective opportunities that globalization offers (such as new patterns of exchange, new goods to produce, new skills to develop, new techniques of production to use, and so on). If people are excluded from these opportunities – either because of international restrictions or due to national or local lack of preparedness – then the overall impact of globalization may be exclusion from older facilities of economic survival without being immediately included in newer ways of earning and living" (A. Sen 2000: 28).

Globalization is one major factor forcing additional demands on workers in Bulgaria. The necessity to know English and have computer literacy, for example, is one direct consequence of the new universally homogenized business society. The acquisition of the new skills requires long-term training and education. In order to comply with the rigorous job market demands, many families invest hard in the education of their children. The market for private schools in Bulgaria is flourishing, each one of them competing for attention and

[99] Commenting on the school initiatives, I need to mention the long tradition of participation in painting competitions fostered among the students. Traditionally local students win first prizes. The interest in painting was preserved and maintained by an old teacher – pensioner these days – who nevertheless continued working tirelessly with young talents in the school. Many beautiful paintings decorated the walls in the school corridors. I saw pictures drawn by students awarded at different competitions. This popularity of painting triggered an application for EU sponsorship. The principal mentioned how in 2001 the school was aided by one NGO from Assenovgrad in applying with a project for furnishing an artist studio. The project application was filed by the school principle. Then, the project was officially introduced by an NGO located in Assenovgrad called "Future for Bulgaria". The NGO activists however misunderstood the objectives and requests of the sponsorship which required the inclusion of all village children, not only the students from the school. The principal explained that the common practice was to use NGOs as intermediaries in applying to external programs. The school can directly apply only if the grant was offered by the Ministry of Education. Unfortunately the project was not approved and the official reason was that the school did not have students from any ethnic minorities. This failed attempt was one of the rare examples of an actual application to EU programs in Cherven.

demonstrating cutting edge school disciplines. At the same time the public educational system, including schools and universities supported by the government, is deteriorating. In many villages in Bulgaria schools have been closed down according to government policies aiming at budget reductions. Therefore, I would assume that access to very expensive and demanding education is quite limited in villages. This situation contributes to the further marginalization of the rural areas and reinforces the unequal economic development between villages and cities.

A. Sen (2000: 25) underlines the importance of human resources development in his paper:

> "The so-called "East Asian miracle" was, to a great extent, based on the reach and force of the "eastern strategy" of focusing on shared – non-exclusionary – human development. In contrast, the persistence of illiteracy in many parts of Asia is a matter of great importance in generating social exclusion and economic deprivation that have both constitutive significance and instrumental consequence".

The author considers the long-term tradition of high literacy among the population to be one of the basic factors enabling the rapid economic development in Japan. Consequently investment in "non-exclusionary" human resource development is alleviating social and economic exclusion.

In Bulgaria introducing IT education in the public school system was a government sponsored project implemented by the joint efforts of the Ministry of Transport and the Ministry of Education. In the web site of the Bulgarian Ministry of Education I looked at normative documents (the strategic program) explaining the objections of this initiative along with the expected results.[100] According to this document, the introduction of IT training in schools was an action corresponding to "the strategic goal" announced at the EC meeting in Lisbon in 2000 to make the European Union the most competitive and dynamic society in the world based on knowledge. This initiative had much to do with the construction of a new European identity and corresponding culture: "In the age of television and computer, it is perfectly feasible to construct a new European culture which would match its American and Soviet

[100] Национална стратегия за въвеждане на ИКТ в българските училища (National strategy for implementing IT in Bulgarian schools): http://www.minedu.government.bg/opencms/export/sites/mon/left_menu/documents/strategies/strategia_ikt.pdf

rivals, and demonstrate once again the vitality of the new cultural imperialisms in a post-industrial era" (Smith 1999: 174).

Not only was this project a way to forge a specific European cultural identity based on telecommunications and modern technologies but according to the strategy cited above it aimed to ensure massive participation and inclusion of broad segments of population. In this sense I could say computer training was part of the inclusive policies of the European Union, aiming at increasing standards in education while making it accessible to the culturally marginalized villages in the rural areas of Bulgaria.

The implementation of IT training in the public schools was heralded by a governmental inquiry into the needs of the schools. This inquiry was done by the means of answering questionnaires. The procedure that followed was not obligatory. In this sense the village school was not obliged to apply but given the opportunity of getting financial grants *"it was a crime not to apply"*, as the school Principal in Cherven put it.

As a result of this application 3 000 BGN of financial government aid was granted to the school for the purpose of furnishing a computer cabinet.[101] I need to clarify that the money was not a competitive grant. This money was allocated as part of the government scheme to endorse IT training in the schools around the country. The Principal co-financed the implementation of the project with means available from the school budget. Each school after receiving the grant was required to implement the program as control on implementation was exercised by local structures of the Ministry of Education – a ministry chiefly responsible for training school teachers about how to make use of the modern technologies.

In the middle of June 2005, the school received eleven computers: the Ministry of Transport donated six computers as part of the nationwide program to support IT training in education. A Dutch businessman donated five computers.[102] The Principal came in contact with him through her social network of colleagues in Assenovgrad. Several times he had donated to schools and kindergardens in Assenovgrad and the last time he decided to donate to all village schools in the municipality.

[101] For the next year the principal had planned the furnishing of a cabinet in physics.
[102] According to the school principal, it was hard to find sponsors. She admited to receiving donations from local businesses – small grants for celebrations, financial aid to children from socially disadvantaged families. Two times the school was sponsored by an industy located in Assenovgrad (the municipal centre) – the enterprise "Kaltzit".

The school project brought the community together for many people participated in renovation and furnishing activities. Teachers and pupils collaborated to clean the room, intended to become a computer cabinet. A worker was hired to provide additional services – repair and renovation.

In 2005 the Principal together with another teacher from the school were trained and certified as specialists in information technologies. With this qualification, the Principal was now authorized to give lectures and teach other pupils and teachers in the school. Indeed during the summer vacation she initiated and led five introductory courses, aided by another one of her colleagues. Four courses were specifically designed for pupils in all grades. One course was intended to provide training to the faculty. The purpose of this introductory training, according to the Principal, was to give pupils basic knowledge about computers and encourage their interests in computer training at school. Apart from following state regulations in her work on this project, I felt the Principal was entirely dedicated to the idea and did her best to ensure the successful implementation. I was also convinced by her enthusiasm to do something for the benefit of the children in the village. The IT education was applied to include training in many of the subjects taught in the school. The reaction of the pupils was enthusiastic from the very beginning of introducing the computer training. Still the Principal was not sure about the reaction of parents but felt that computers at school did not determine the number of potential pupils.

My observation among village youth led to the conclusion that the level of computer literacy in the village was not high. I knew of only few young villagers who regularly used computers at home. These young people came from relatively well off families, one of them in particular was the family of Radka, interviewed in the previous chapter. According to her estimation, there were around 25 – 30 internet subscribers in the village. Before there was an internet café but it did not exist for long. Overall, most village children were not computer addicts and rarely spend time surfing the Net. I expect that the level of computer literacy would increase as a result of this school project. Obtaining computer skills would increase the chances of finding better employment opportunities for the disadvantaged children in the village. Indeed, increasing the computer literacy among pupils and teachers was one of the intended results of the strategy pointed out in the program. Consequently the IT training was expected to increase the chances of students to compete successfully on the common EU labour market. More specifically the statement in the program cited above highlighted the increased chances for the *young Bulgarians* to successfully compete on the EU market *with their European counterparts*. I interpret this objective to mean a step

towards abolishing economic barriers and granting access to equal opportunities of realization (inclusion) to all EU citizens, regardless of their ethnic, national or residential background.

Additionally the school offered training in two foreign languages in combination with computer classes. Now the Principal expected that parents would consider the school program as more attractive and updated and hoped that probably this project could save the school itself. As the Principal said, learning at the village school was faster since more attention was paid to individual students in comparison to schools in big cities. I went to see the children in their new computer cabinet at the beginning of the school year in September 2005. They were too young to make a complete sense of their new acquisition. Nevertheless I saw their smiling faces and felt their excitement when I took a photo of them sitting in front of the new computers.

Today with the emergence of the free market economy education has also become an object of commercial display – supply and demand. As with any other market commodity, the commoditization of education has brought on different varieties and options available to consumers. The market of the newly opened private schools in Bulgaria is flourishing. However, access to the new education opportunities is limited to a distinctive set of people or families, the new rich and members of the new elite thus increasing the social exclusion among rural residents. Therefore education had become a status symbol in a culture of growing social inequalities and emerging gaps between the rich and the poor. In this context, implementing IT training in the public school system was a way of overcoming inequalities emerging from differentiated access to quality training (cultural capital).

The introduction of basic computer courses at the local school, I evaluate as one successful attempt at continuing the school tradition in the village by bringing the local community closer to the global information society. At the same time, the implementation of this program demonstrated how *"education was a function of the national government"* (Sanders 1949: 209) where *"economic dependence of peasants upon the local and national authorities was increasing"* (ibid: 209). Indeed my impression was that the village community had lost its self-sufficient feature, getting more and more dependent on interaction with outside factors and forces driving the neo-liberal policies of the government. In this sense, judging from my experience in Cherven, I claim that rural communities were being reshaped after the fall of the socialist state with its preoccupation with industry and agriculture. Jonathan Friedman

(2004) phrased it *"the globalization of the local"* when referring to processes of reshaping communities.

The School and Chitalishte as Promoters of Community Transformation

In this section I would like to address the main point of the chapter – community transformation, taking in consideration both local and nationwide context. For that reason I need to present the two community institutions (school and chitalishte), acknowledging the broader implications for the Bulgarian society and culture in historical perspective. It is important to emphasize how different political ideologies (socialist in the past, neoliberal in the present) have played a role in influencing their position and functions over time while these community institutions – the school and the chitalishte – helped channel state policies and development programs.

From its very beginnings the Bulgarian chitalishte has been firmly embedded in the fabric of local communities and constituted a public space for civil initiative and action. In its early years the chitalishte was politically very active in spreading anti-Ottoman propaganda and it was very much a centre of the pro-Bulgarian independence movement. Hence the process of nation state building was facilitated after the proclaimed National Liberation (1878) by propagating national culture and tradition along with introducing modernity through European and world culture.

In the pre-socialist period the Bulgarian chitalishte was by law a politically neutral organization, offering space for civil initiative and engagement (ibid: 25). However, during the socialist period (1944 – 1989) the chitalishte was brought under state control and subordinated to the Fatherland Front – an offshoot of the Bulgarian Communist Party. Therefore all events and activities in the chitalishte became politicized and turned into an instrument of state propaganda (ibid: 27-29). Then the communist regime stove to eradicate the tradition of civil participation in local communities and replace it with centralization policies endorsing loyalty to the Communist Party (ibid: 29). During socialism this was done through mass participation of villagers regardless of gender, generation, age, political affiliation or family background. In a way each generation in Cherven could find itself represented through various clubs at the chitalishte – pensioners' club was a public space where older village residents could socialize. Younger villagers participated in local folklore groups, amateur theatre performances, sport competitions, or took part in organizing and

celebrating holidays. Indeed the chitalishte was a community centre where educational activities were carried on in combination with all other forms of popular culture.

All-accessible and inclusive were the events and activities at the chitalishte since it was through mass participation that the village community was represented as egalitarian and homogeneous in line with the socialist ideology. In this way collective (group) rights and identities had been significantly endorsed by the socialist state through sponsored activities at the chitalishte. Therefore the emphasis of social integration was community solidarity and participation corresponding to the French definition of social inclusion. With the end of the communist regime in Bulgaria, the chitalishte had lost its political significance as a state cultural institution.

At present the chitalishte in Cherven does not function with its past capacities. Only the library still operates to mostly serve the interests of young pupils at the village. Many social activities and clubs closed down after the changes in 1989. One major reason for this decline, noted above, was the withdrawal of the state from full sponsorship of cultural and community centres. In this sense the culture house in the village shared the common trajectory of many similar institutions in the country. Hence I refer to the total decline in state support for cultural institutions, as seen in the limited subsidies granted to state theatres, opera houses, public schools and libraries.

Another explanation for the difficulties the chitalishte is facing nowadays is related to its new status as a civil society organization (according to the legislation passed in 1996). However, the general underdevelopment of civil society in Bulgaria and lack of local preparedness continues to be one major obstacle before the progress of the chitalishte as a well functioning nongovernmental organization with a distinctive contribution to the rural community.[103] In Bulgaria both interrupted tradition in self-governance and legacies of

[103]The uneasy and controversial adoption of the practices associated with the civil society in the context of eastern and south-eastern Europe had been debated by anthropologists (Hann 1996, 2003; Sampson 1996, 2003). What has prompted this debate is the public revival of symbolic distinctions (e.g. based on ethnicity and religion, class and political affiliation) in the Balkan societies, decisive in determining the dominant attitudes and values of people. In the last decades many social differences have re-emerged after being suppressed for a long period during communism. This revival suggests the need for a functioning legal mechanism that is able to reconcile the different interests in the framework of a civil society. Civil organizations provide one approach at integrating opposing interests and in the best case exemplify the interaction between individual citizens and the state. Back in pre-socialist times, Sanders (1949: 170-171) noted the difficulties in establishing civil society organizations in the Bulgarian village of Dragalevtsy. Then the national government encouraged its village representatives to set up organizations to promote specific causes and social activities. As a consequence many civil organizations were set up in Dragalevtsy including the Red Cross, the Junior Red Cross, the Union for the Protection of Children, the Association of the Decoration for Valour, the Association for the Orthodox Christianization of Bulgarian Youth, etc. It was notable that intelligentsia was standing behind all initiatives for

totalitarian control justify popular ignorance of how NGOs function to protect the interests of citizens in cooperation with state authorities.

The socialist centralization policies resulted in civic disengagement, social withdrawal and heightened distrust towards public institutions while at the same time reliance on personal and family networks strengthened as a counterbalance (Roth 2007: 10). If we think of the chitalishte as representing accessible social capital through establishing "networks of civic engagement" and social norms (Putnam 1993, 1995), then the recent marginalization of this institution in Cherven would signal a process of gradual decline of social capital available in the community. I would then argue that this decline of social capital could represent a case of exclusion for locals having various implications – social, cultural, political and economic.

As my case showed the general curtailment in social activity, alienation and a sense of community fragmentation all contributed to the decline of the chitalishte in Cherven as a representative village institution. The demographic crisis and out-migration of educated young people to urban centres additionally influenced chances for local development. In this situation it would require exceptional efforts on the part of educated and caring individuals to activate and preserve the chitalishte as a valuable entity of the community. Unfortunately, so far the indications pointed to a lack of solution or plans for further development.

Historically both the school and chitalishte in Cherven originated as a result of local initiative. In 1926 the local chitalishte was founded on the initiative of village teachers. The establishment of the first school in the village pre-dated the National Liberation (1878). Initially the mission of both institutions was to promote education and culture and thus contribute to the social and economic inclusion of the marginalized rural population. Comparing the chitalishte to the school in the village, I could acknowledge the importance of civic engagement for the benefit of community evident in the school-related project of introducing IT training. Unlike the chitalishte, the local school was included in the government program for building IT skills among teachers and pupils.

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establishing these civil society organizations in the village. Therefore the main agents of social transformation and change in Dragalevtsy community were the members of intelligentsia (in contrast to Cherven where the local entrepreneurs introduced new practices and discourses into the community). As the case of Dragalevtsy demonstrated the civil society organizations were short-lived in pre-socialist times. The reason was the peasants were not willing to support the work of such organizations since they did not receive any immediate benefits, according to Sanders (1949).

Participation in the program was not obligatory but to a great extent depended on the willingness of the school officials to initiate and submit an application. Hence the program encouraged private initiative and self-regulation characteristic of civil society organizations. This project was indicative of the care of the state focused on only one segment of the village population – the young schoolchildren. In this way, inclusion was possible through education. Young pupils were targeted by the state because they had the potential for development in line with the new imperatives of the global economy. The education of the new labour force was an important policy of the neoliberal state. The aim of this policy, as proclaimed in the official government documents, was to educate the new European citizens thus contributing to the establishment of the new European community and identity. In positive terms, this initiative was a sign of inclusion mostly because it dealt with the socially and culturally marginalized rural residents.

Likewise, in pre-socialist period Sanders (1949: 72; 132-137; 161) viewed the school as groundbreaking influence in the closed village community. Through schooling young people came in touch with secular, rational understanding of the world that in some cases produced conflicts and disconnected them from the familistic and religious foundations of the village life. As a result the local school was regarded as a threat to traditional structures of the collectivist rural society like family and religion as it contributed to encouraging the individualising aspects of personality. Nevertheless the transition from "collective" to "individual" consciousness and mode of development was comparatively slow in Bulgaria. Kolev (2002: 159) confirmed that prior to 1939 the *"atomistic model of the professional individual"* was not at all common in Bulgarian society. He asserted that at that time the average Bulgarian had not yet been emancipated from the extended family bonds and hence continued to be dependent on family and community. Naturally those who had achieved professional training and had become independent were quite a minority in comparative terms.

Education and culture were two areas sponsored by the socialist state and made available to broad segments of Bulgarian rural and urban population. Through these all-inclusive policies the socialist state sought to win the loyalty and support of all citizens in a process Znepolski called "corrupting the masses" (ibid: 235). When the socialist system of control and protection was gradually dismantled after 1989, the adults who witnessed this process were left to cope with the new social and economic conditions on their own with little advanced preparation. Thus people had to take individual decisions and deal with a new unpredictable reality. Consequently their success in the open market economy depends to a great deal on

their abilities to revaluate and make use of the cultural capital (professional experience, skills, education and training) they had gained under socialism.

The tendency in global education now, Genov (2004: 456) argues, favours flexibility and *"life-long learning"*. In this new world, computer literacy and English language had become the two basic codes of the modern world (Kolev at al 2000: 44). The extent to which individuals and nations can benefit from the new information technologies will determine their success in the global economy. In this context the educational system in Bulgaria now has to facilitate the training of specialist for this global economy. Therefore the case of introducing IT training in the village school (and in many other schools in the public system of education in Bulgaria) makes a good example of how a national education system could be upgraded to come to terms with the new global demands.

While during socialism the educational system prepared professionals for every branch of the economy, during postsocialism it served and facilitated different social processes. As much as education is still seen as the most important aspect in integrating young people into the new economic and political society, it is a factor determining social inequalities more than ever before. According to the Bulgarian sociologists A. Rajchev and K. Stojchev (2004: 73 - 78) school system is now a powerful mechanism for producing and re-producing social inequalities.[104] In their view, the "transition" in Bulgaria is characterized by *"class chaos"* (ibid: 73) since the basic class indicators (status, property, incomes and consumption) were not matching with one another. Therefore education (in the meaning of cultural capital, I suggest) is the means by which these class indicators could be coordinated and thus the processes of class formation completed. I have already discussed how class position is related to education in the previous chapter on family business. Then I referenced K. Ghodsee (2005) who considers education as a valuable cultural capital determining and legitimating class distinctions.

[104] Similarly A. Rajchev and K. Stojchev (2005: 74) contend that the differentiated access to education would define the class position of each individual in the postsocialist Bulgarian society. They even point to four categories (classes) emerging in our society: top (10%); middle (40%); low (30%) and pariah (20%). These groups were already shaped in high school. Basically the children from the top and middle groups would get access to the two basic codes of the modern world - the English language and the computer. According to the authors these two codes represented that crucial form of cultural capital on which the mechanism of class differentiation in Bulgaria is based (ibid: 75-76). In other words the two authors argue that some children could be integrated in the "information society" (Toffler: 1990) while others would be completely excluded and de-classed.

Therefore, in contrast to socialism, today there are other mechanisms of regulating access to resources, and notably access to good training and employment. In the socialist society it was of decisive importance to have connections to the centre by means of political affiliation (Kaneff 2004). During postsocialism other characteristics were of greater consideration such as consumer preferences, incomes, status and work adaptability often determined by age. These new features of the new market culture channelled the development of the village economy and had placed priority on the new skills of the labour force. Hence through such integration policies labour market exclusions could be overcome by upgrading personal skills and investing in personality potential to absorb new knowledge – thus creating human capital. Investment in human capital I relate to the Anglo-Saxon definition of social exclusion/exclusion. This definition accentuates self-regulation and individual achievement in a competitive environment. Therefore to its very end the school in Cherven had preserved its capacities and meaning it held for the villagers many centuries ago - bringing people in line with the new economic realities and making them competitive in the global economy.

Conclusion

My thoughts based on observing the present development of the village led to the following conclusions. The institutions of public representation of community during socialism such as the village cooperative and the chitalishte were dying out. In the past social control and balance of powers had been maintained through these structured forms of communal participation. In contrast, at present new forms of community development, corresponding to the market ideology of neoliberalism gradually took over their symbolic meaning as privately owned new luxury hotels, restaurants, and grocery shops emerged in the village landscape. In this way individualism manifested through consumption was accentuated and prioritized over the socialist ideology centred on community solidarity and equality.

The chitalishte had once provided the pubic space, all accessible and inclusive, inducing the notions of equality and egalitarianism among villagers. In contrast the social distinctions relevant during postsocialism – status, wealth, political affiliation – provoked a sense of a major community break-up and stimulated experiences, sentiments and life crisis situations of intrinsic inequality and social exclusion. Today the chitalishte was no longer an important community site. The few remaining social forms of communal participation (e.g. library) being inadequately funded were to a great extent marginalized and therefore lingered almost ignored by the villagers.

The new global economic culture had prioritized two areas of development that had replaced extensive farming and industry: the new economy was based on developing the sector of services and establishing the computerized networks of the information society (Alvin and Heidi Toffler 1994). This shift was reflected at the level of community by reshaping the village economy. In Cherven, these policies had shaped the expectations and actions of the business elite as new hotels and restaurants were erected to satisfy consumers. Therefore, the postsocialist, neoliberal path of development had placed emphasis on developing a new type of village economy – economy of services (visible through the growing number of hotels and restaurants) and economy of knowledge ("information society" reflected by the school-related project of introducing IT training).

In this chapter I argue that there is a shift in community relations rather than a total decline of community. Nevertheless I acknowledge that some of my middle-aged informants may experience it as a case of community fragmentation if the concept of "community" is associated with notions of solidarity and cooperation - a romantic approach, G. Creed (2006: 23-48) warns us against. From that perspective, a community in which these features are missing could be viewed as declining and fragmenting. However, I would rather prefer to take a more balanced view and argue that this village community is transformed thus implying that there has been a shift in the way the community is reconstructed corresponding to the shift in political ideologies. In such a way Cherven is an exemplary village demonstrating how new meanings and identities have emerged to replace the obsolete others in an ever dynamic world of changing ideologies and ideas of development. Thus the village community became transformed and integrated in a manner of symbolic inclusion according to the challenges posed by the *"cultural imperialism"* of the post-industrial society, referring to Smith's (1999) terminology.

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Chapter 6

SOCIAL SECURITY AFTER SOCAIALISM: THE SIGNIFICANCE OF KINSHIP AND SOCIAL NETWORKS[105]

Introduction

In the previous chapter I focused on the changing relationship between the village and the state observed through two important community sites – the local school and the local culture house (chitalishte). It became clear that after the "withdrawal" of the socialist state (Ryner 2002) local leadership and initiative were encouraged and given priority over centralized decision-making. Still among the persisting problems in Cherven (and rural areas in general) remained depopulation and lack of qualified staff – a major obstacle to cultural and social development.

This chapter is not about social security provisioned by the state – although I have to clarify the general context of such social policies connecting two periods in modern Bulgarian history – socialist and postsocialist. In this chapter I am mainly concerned with local meanings, attributes and actions associated with social security in the village. For that reason I would like to focus on aspects which in my view best exemplify local practices and discourses*: reciprocal relationship between parents and children, property and inheritance, and attitudes to work and employment.* Generally these issues are reviewed in the context of family and social networks. Hence I also explore the relevance of such networks in the process of social inclusion/exclusion. To simplify the discussion I break the concept of social security into the components of need and care. In the analysis I identify what the common needs were and how care was arranged.

Anthropological debate on types of social security centres on local strategies of how people try to cope with potential insecurities and life crisis situations (v. Benda-Beckmann et al. 2000). In many cases these strategies require the use of all possible resources (skills, labour, land, property, money, etc.) accessible through kinship and social networks. I discuss how processes of social exclusion relate to efficacy and accessibility of such

[105] A modified version of this chapter is under press in the Bulgarian academic journal *Българска етнология* (*Bylgarska etnologia)* for 2011. In the references, see Bogdanova (2011): Социалната сигурност след социализма: значението на родствените мрежи.

networks. In this respect I point to two opposite examples of how belonging to a kinship group was experienced in Cherven.

The central problem in the analysis - how functional/dysfunctional kinship networks affect individual and collective social security – is discussed by presenting different cases from Cherven. I argue that kinship networks were constructed on the basis of a reciprocal exchange of resources and services expressed as a flow between and across generations. I suggest that the moral foundations of kinship relations imply shared resources and obligations to give assistance without expectations for immediate return. The binding nature of kinship had been discussed in classic social anthropology (Fortes 1969: 242; Sahlins: 1974). Hence my research contributes to this body of literature analyzing the practical applications of family and kinship relations (Finch and Mason 1993; Finch 1994). I explicitly relate the topic of kinship assistance to social security (eds. Haukanes & Pine 2005) to address the question of providing social security after the "withdrawal" of the state and the "contraction" of welfare (Kornai 1990; Aslund 1992; Klaus 1992; Kornai and Eggleston 2001).

Before discussing my cases, I need to introduce the general context of social security provisions in Bulgaria. In their book on the Bulgarian "transition" Rajchev and Stojchev emphasized the high level of social provision during socialism (2004: 62-63). They noted key indicators of the general living standard sponsored by the socialist state: among these indicators was health care, property ownership, accommodation policies, various social benefits, culture consumption, education and employment. Social policy during socialism was a political tool claimed Znepolski (2008: 229-235, 245-250) in his book *The Bulgarian Communism.* He viewed the socials benefits (privileges/social rights) granted by the socialist state as a way of "corrupting the masses" – a means of ensuring loyalty and support for the regime. Hence, in his opinion, the social policy provided the resources for legitimating the communist power brokers.

Even though the average Bulgarians enjoyed numerous social privileges during socialism – subsidised healthcare and education, all-accessible culture, and guaranteed employment – the quality of life was substandard compared to the general European levels (Znepolski 2008). Nevertheless these social benefits and community life improvements were a great step forward in the development of Bulgarian society, which was predominantly composed of rural residents (small land holders) in the pre-socialist period.

During socialism the emphasis of social security provision was on collective rights, not individual rights. Along with the French definition of social integration special benefits were granted to groups such as professional guilds (e.g. subsidised canteens in factories and institutes, recreation facilities for workers of specific industries) and social groups under special circumstances or with a distinctive status (e.g. mothers, young children, pensioners, war veterans, anti-fascists fighters, etc.). In this way the socialist state sought to level class distinctions, equalize all citizens and put emphasis on community and solidarity. Therefore the collective identities and rights were emphasised and overrepresented at the expense of individual rights and identities which were generally suppressed and marginalized (Znepolski 2008: 89).

After the fall of the communist regime in 1989 the system of granted social rights and privileges, having lost its ideological significance, was dismantled. In the decades that followed the Bulgarians had to struggle to sustain the previously taken for granted social acquisitions (Rajchev and Stojchev 2004: 65-69; Znepolski 2008: 250-254). The crumbling living standards affected large segments of society. In this new situation in the Bulgarian society, represented as egalitarian and homogeneous during socialism, began a process of fragmentation and social differentiation. Although I would not like to engage myself directly with problems of class formation, I need to acknowledge the greater social polarization of society over the last 20 years. One result of the social breakdown was the emergence of socially disadvantaged groups (or socially excluded groups). Under the new condition social policy of the postsocialist state had been redefined in providing minimum social assistance restricted to the defined groups of the socially excluded as stipulated in government programs (see the Introduction). Therefore the scope, focus and objective of social policy had shifted – once being an instrument of ideological propaganda, social policy has now become concerned with marginalized social groupings.

Therefore, in this chapter I consider another aspect of state "withdrawal" as manifested in declining living standards, and formation of vulnerable social groups. In this new context social security policy was aimed at helping social groups at risk but still fell short of alleviating growing social inequalities. In this situation my purpose is to explore how villagers understand "social security" and what activities they undertake to make social security provisions for their families. In Cherven people's expectations of social security provision emphasise kinship and family relations. In other words, social security is to a

great extent still a family prerogative. The importance of the family and kinship networks has been especially reinforced after the collapse of state socialism.

In my description of social security arrangements, I discuss local strategies taking place in village households. I also make references to state regulations in order to explain how legislation influenced social security strategies of families and individuals. In this respect, kinship networks and state institutions functioned side by side as providers of social security whilst one type was shaped and directed by the other. In the sections that follow I describe a number of cases and suggest possible interpretations in relation to social security.

Local Meanings Related to Social Security: The Role of Family and Kinship Networks

A good example for the significance of kinship networks in social security was provided by the family of my hosts, Iliya and Rossi, and their kinship group. The families of Iliya and his elder brother Dancho lived in separate houses next to each other in a shared plot of land with a garden in the front. The produce from the garden and the domestic animals kept in the back yard (cows, chickens, hens, calves, pigs, etc) was shared among the two related households. Rossi's brother was also married in the village and lived with his parents in a separate house not very far from Rossi and Iliya. Very often I saw his children coming over to Rossi's house to play with their cousins. The ongoing interaction and cooperation between the relatives was intensified during vineyard cultivation and crop processing in the backyard of the house. Similarly Sanders (1949: 102) made a good description of the close kinship relations in the village of Dragalevtsy:

> "This feeling of closeness in families related by marriage did not stop with the husband and the wife, nor with the single in-law gained by each family. It included, as well, the in-law's parents and brothers and sisters with whom just dealings and proper behaviour had always to prevail."

There was one explicit example of family solidarity during my stay with Rossi and Iliya. In 2005 they decided to reconstruct their family house. Rossi explained that the house required modernization in order to accommodate the families of their two sons once they got married. According to traditional understandings, parents were obliged to provide the son with a home, where he would bring his future wife. Similarly in the past girls were expected to have a dowry upon their marriage. These traditional expectations reflected upon household duties associated with gender: men were concerned with construction and

repair, while women were occupied with maintenance and decoration. Similar distribution of responsibilities I could observe today. I saw how my host family aided by their close relatives, reconstructed one part of the family estate. All activities centred on the house confirmed traditional obligations based on gender.

Since housing was an aspect of social security, helping children acquire suitable accommodation was desirable and highly esteemed in the village. Hence a consideration of fulfilling parental obligations motivated the reconstruction project. As much as the house was central in family reproduction, money and personal efforts were continually invested in reconstruction and maintenance of the property. During the period of my stay with their family, Rossi and her husband Iliya reconstructed the upper floor of the house.[106] Rossi complained that building materials were too expensive, thus saving was worthwhile. In order to minimize labour costs, they paid less for construction services to outsiders. Instead the family received help from their close relatives – the families of Rossi's brother and uncle and the family of Iliya's brother. In such a way they managed to use their well maintained kinship networks.[107] I would suggest that house building generated kinship reciprocity since helping relatives were not paid immediately. Instead, the families exchanged services and shared resources (labour, money, food) in the long run.

It is necessary to describe with a few sentences the house itself. The house was one of the few houses in the village to have bathrooms inside.[108] The interior and exterior of the building was modern and gave an impression of above average wealth and luxury. Three ornate fireplaces were placed in different parts of the house. The walls were decorated with valuable trophies, accumulated by Iliya as a devoted hunter. In addition his wife took up

[106] Many times in the chapter I refer to my host family. I choose to describe this particular family and their close relatives in greater detail, since I stayed at their house throughout the period of my field work. As a result I had greater access to their kinship group.

[107] Throughout the year I was able to observe how this extended family maintained their kinship relationships. Together they gathered to celebrate name days and birthdays. Then women in the family cooked together to prepare for these festivities.

[108] Generally villages in Bulgaria have bad infrastructure in terms of sewerage systems and quality of roads. According to official statistics only about 2% of the villages in Bulgaria have sewerage systems. Cherven had electricity, running water, telephones, but for the most part of the village there was no sewerage. On several occasions neighbouring families cooperated to install a sewerage system on few streets in the village. Therefore, the absence of state services in terms of infrastructural investments had motivated people to integrate their efforts in order to satisfy their common needs. In this case people themselves assumed the responsibilities and functions of state authorities. However, the streets were not repaired for a long time. During my stay the village was granted approx. 4000 BGN (approx. 2000 EUR) government aid in order to improve the infrastructure. This money was not enough for any major reconstruction. However, the main streets of the village, near the central square, were renovated to some extent. Having insufficient funding from the government the mayor was struggling to improve the living conditions for the villagers as much as the meager resources permitted.

embroidery as a hobby and rapidly produced several tapestries which she framed and proudly hung. The choice of furniture and surrounding ornamentations also projected an image of affluence and comfort. The well maintained house and the surrounding garden to a great extent served to convey a positive public image of the family. In this way this property had became a status symbol and signified important social distinction. It was the CV of the family – a reflection of their work efforts and diligence.

Rossi remembered how after her marriage twenty years ago, she came to live with Iliya's family in the house. Then the only two rooms had to accommodate 10 persons: Iliya's parents and grandparents, his brother's family (wife and child), Iliya, Rossi and their firstborn son Mitko. Later, the elder brother Dancho built his own house on the same plot. Financially he was helped by his parents. Relatives and friends assisted with the actual construction of the house.

As the years passed by Iliya and Rossi remained living with the old parents in the family house. Gradually over the course of time they saved money and expanded the building. My hostess told me that any time they found a source of additional income - they would invest the money into improving their home. The extensions to the ground and upper floors they had done during the 1980s. Rossi carefully explained how the floors and rooms of the extended property were divided between the two sons and the parental couple (Rossi and Iliya). The ground floor with the adjacent rooms Rossi and Iliya decided to preserve for themselves one day when their sons got married. The upper floor was promised to Mitko, the senior son. This summer in 2005 they started building the part of the house that was to be inherited by Stefan, the youngest in the family. In fact, maintaining the house and passing it to the descendents was a form of social security across generations.

The upper floor (where supposedly Mitko would live with his family) accommodated a spacious living room with a fireplace, two small bedrooms and a bathroom. As I occupied one of the small bedrooms upstairs I seldom saw anybody coming to this floor. The lavishly furnished living room was not inhabited all year round. Habitually, the family members resided in other parts of the house, and mainly in the ground floor where they had dinner, watched TV, and invited guests. Commenting on the luxurious settings, Mitko once told me that he was not used to dwell in such comfort. He then added that he preferred a modest and tidy home. I emphasize this point to demonstrate how the house interior and exterior was a way of projecting a social status in the community.

As much as Iliya directed his efforts in organizing and executing the construction work, his wife Rossi had a decisive role in selecting the type of furniture and decorations. Consequently gender distinctions were further reinforced - men were in charge of the construction work while women put the final touches. Yet the family project provoked complicated negotiations between the spouses. Once I found them arguing about some details in furnishing a room. The debate was heated since Rossi was persuading Iliya to make some changes. Suddenly she turned to me and instructively told me: "Look, one day when you have a husband, you should learn how to deal with him." This comment was a reflection of the well established perceptions of the male and female roles in the family: being traditionally subordinate to her husband, a woman had to be skilful in influencing and controlling him.

Rossi desired that her sons remained in the family house once they got married. She had firmly decided to financially separate the households of her sons one day. Each household should pay its own bills without her help, as to avoid any trouble. In this way she appeared as an impartial mother who wanted equal standing for her sons. Once she complained to me that her mother-in-law had prioritized Iliya's brother, in sense that she had helped Dancho's family more than she cared for Iliya's. In this light, her concern for equal treatment of sons was understandable. Speaking about the future, Rossi did not hide her anxiety about her sons going away from the family. I made a connection to Sanders' observations (1949: 146):

> "The population in a familistic society tends to be stable. The folk legends and beliefs stressed the importance of remaining at home. Permanence becomes a virtue, for travel outside introduces too much novelty. Separation places a strain upon the family relationships, which must be kept at full vigour in the interest of community self-preservation."

I would rephrase Sanders and suggest that in some cases the separation of siblings undermines kinship relations of interdependence and provokes situations of social insecurity.[109] As will be noted in Elena's and Yordanka's stories later in the chapter, separation of family members could be conducive to disintegration of kinship networks manifested through disrupted family obligations. Hence the separation of siblings could

[109] It is necessary to note that in the last decades short- or long-term labour migration intensified as a response to massive unemployment and economic deficits. These processes had their effects (positive and negative) on family relations and rural communities. In Cherven I came upon only a few such cases when members of the family migrated abroad to support their siblings left in the village.

influence social security of individual members of the kinship and family group. When expressing her concern about the prospect of her sons leaving the village, Rossi possibly feared she would suffer the harsh fate of an abandoned and forgotten mother.

Observing parental obligations, Rossi's younger brother similarly had to provide accommodation for his two sons in the village. At this time, he lived with his family (wife and two sons) along with his parents in the parental house. This house would be inherited by one of his sons. Additionally he had recently bought another house on the same street, very close to their home. He planned to repair this house and leave it to the other son. Rossi and Iliya agreed to help him financially by lending money - a portion of the bank loan they had taken the same year, 2005.

Maria Todorova (1993) gives the historical perspective on Balkan inheritance patterns and relates them to family and household size and structure. She describes the traditional arrangements regulating the passing of the property from generation to generation:

> "According to tradition, the house was left to the youngest son, with whom, as a rule, the surviving parent resided. It was also believed that the youngest son was the least likely to accumulate his own property, so it was considered only fair to pass the family house to him" (Etnografiya, 1980: 341 cited in Todorova 128).

Similarly in the extended family of my hosts, I could observe that Iliya, the youngest son, inherited the family house where his parents still resided. His elder brother Dancho had built a house next to Iliya's in the same plot of land.

The common understanding was that parents were supposed to provide a home for their children. It was a parental obligation to support the children and make as smooth as possible their transition into the adult life. In this way parents felt sure they have completed their obligations to children and grandchildren, and thus ensuring the social and physical survival of their offspring:

> "Inheritance endows the individual with both material resources (of which agricultural land can be taken as a paradigmatic example) and a set of social relationships both within the family and outside. The most basic item of social inheritance is the fact of membership in a family. Within the family there may be ties of obligation to the parents, ties of comradeship and duty

to siblings, as well as various connections to more distant kin" (P. Heady and H. Grandits 2003: 5).

This way of thinking and acting was related to providing social security across generations and along kinship and family lines. I could term it long-standing social security or social security in future perspective. To use the idiom of need and care I could assert that the tradition dictated the need – provision of home – and kinship networks provided the resources – labour in this case – to satisfy this need. Thus the providers of care were the parents and their close siblings. The beneficiaries were the younger generation in the family – the unmarried children, in this particular case, the sons of the family.

Two Cases of Dysfunctional Kinship Networks

Contrasting the functional kinship networks of my host family was the example provided by two elderly women – Yordanka and Elena. The two narratives in this section I use to uncover the local meanings associated more closely with the concept of social security. These life stories serve to clarify the general context for the analysis on the significance of kinship and family relations in correspondence to need and care as components of social security. In the discussion that follows I theoretically connect the two main concepts in this chapter - "kinship networks" and "social security" to property (village house), inheritance and questions of common morality.

Yordanka's Story

Just across the street, opposite my hosts' family house, there lived an elderly couple, pensioners. One day the 57 year old woman approached me in the street and requested a meeting with me. I promised to come to her house and listen to what she was to tell me. In the following section I will describe her story in greater detail.

When I visited Yordanka, following our meeting on the street, I was surprised to see two other women - guests in the house. Both of them were very close friends of Yordanka. Soon after my entering and greeting them, Yordanka began telling me the story of her life.

Today Yordanka and her husband hardly made the ends meet with their poor pensions. After her marriage to Kosta in 1964, Yordanka came to live in the village. In the first years

of their marriage, her husband was employed in the cooperative. In a few years, he started working as a truck driver and regularly travelled abroad. In this period he earned enough to support his family. Unfortunately he hooked up with bad company and started drinking away his salary. At this point Yordanka did not mention any incidences of family violence. She only told me that her husband was an alcoholic without revealing further details of their family life. Now, she said, Kosta was herding the goats of the villagers - around 80 goats and was paid 240 BGN monthly. The problem was that each of the villagers paid individually throughout the month, so he could not collect the money all at once. As a result, the pensioners had accumulated a big debt at the grocery shop. Because of unpaid water bills, Yordanka did not have any water in the house for one year. She did her laundry at the public spring, in the central square. It was due to the Mayor's mediation with state social authorities that the water in the house was running again.[110]

Yordanka gave me a full description of their family assets and liabilities. They possessed 5 dekar of land, at that time given to the village cooperative. [111] In her household she looked after three hens, three goats, one cow and one donkey. She was cultivating vegetables in her plot near the house. She and her husband had received social aid for the winter season 2004/2005 - slightly over one ton of coal. Although she complained about being sick and unable to work, she did not get any social pension for her sickness. Before retirement Yordanka was employed at a number of low paid jobs. She now received only 50 BGN as a regular pension and could not afford buying expensive medications.[112] Milk from the cow was their essential meal. The surplus of milk she sometimes traded to the neighbours to buy bread at the grocery shop.

She complained that because she owned one part of her parents' house, the social security system did not classify her as a socially disadvantaged person. In this way she held a property which did not bring her any benefits, but only prevented her from receiving the needed social assistance. Talking about property, Yordanka mentioned how difficult it was for her to pay the annual property taxes. She skipped a few years without paying. Nevertheless, she was aware of the legal regulation stating that if the owner didn't meet his obligations in the course of 5 years, he would lose ownership rights.

[110] My personal encounters and conversations with the mayor also confirmed his involvement with problematic situations, regarding social exclusion and need.
[111] Yordanka remembered that many years ago her grandfather had plenty of land. In order to evade paying high property taxes he officially reported only a tiny portion of the land property. During the land restitution, his heirs received only that land that had previously been reported.
[112] The stated pensions and other amounts that are given in the chapter were valid for the period of my fieldwork (2004/2005).

The next part of her story concerned her two daughters. The older daughter, Elena, rented a flat in Assenovgrad. She was a widow now but, before, her husband used to gamble a lot. Family violence was not a rare occurrence in their family and often the husband would take the last of her money to gamble. Eventually he ran into big debts and hung himself. Elena remained alone with her only daughter – a talented young dancer. Elena was unemployed for a long time. She could hardly manage to look after her child, paying for school or dancing lessons. It was a pity, since the granddaughter had such a talent, Yordanka told me. As a grandmother she lamented not being able to provide help and support to her two daughters and their children – an issue linked to morality and family obligations between generations.

The second daughter Veska was a permanent resident of Plovdiv. She was working in the milk-producing industry there. Both her son and daughter were unemployed. Yordanka explained that Veska and her children rarely came to visit them in the village because they could not afford the travel expenses. In this case, the family rarely gathered together. In a way poverty contributed to the separation of the family members and led to the factual breakdown of family interaction.

While lamenting the poverty of her daughters, Yordanka mentioned that she preferred if both of them owned a house or apartment instead of having to rent accommodation. She used the local expression, *"to walk upon people's roofs/water drops"*, figuratively speaking about renting a place. Her attitude indicated how possessing a house or apartment was preferable to renting. At the same time her expression opened a whole new area for interpretation of how villagers regarded possessions such as a house (apartment) and viewed social mobility.

The village house, where Yordanka lived with her husband and mother-in-law was a disputable property. The deceased sister-in-law had been staking a claim for this house. Now her husband continues pressing the pensioner couple. Yordanka explained that he would like to drive them away from the house. She described her deceased sister-in-law as a vile woman, who was all the time demonstrating her prosperity with an air of superiority. At the same time, she witnessed the poverty of her brother's family without offering to help in any way. She would even give her old clothes to the Gypsies instead of offering them

first to Yordanka. In Yordanka's words, *"relatives don't help but step aside and watch the fun"*.[113]

Elena's Story

The other elderly woman in the room, Elena, was also eager to tell me about the great misery she lived through. She told me how much she suffered having to live with her son and his wife. The son was a turner and earned about 140 BGN monthly. His wife was employed in the local shoe workshop with a wage of 100 BGN. They had two young children. Elena told me the family was buying on credit in the local shop and hence had accumulated much debt.

Elena explained that the source of her unhappiness was the bad treatment she received from her daughter-in-law. She was terribly offensive to her, often physically violent and rude. Regularly she would take Elena's pension and use it for her own purposes. Elena even suspected her daughter-in-law had mental problems. To her total dismay, both her son and his wife insisted that Elena should find a husband and move out of the house. In fact, the house was the family property of Elena and her deceased husband. They had bought it after saving money from tobacco cultivation. Her husband could no longer endure the family conflicts and killed himself with high voltage electricity. Today Elena was granted one small room in the house. Three years ago the roof of her room collapsed and since then Elena did not have money to repair it, so at present she continued to live in this dilapidated room. Elena had two grown-up daughters – one in Assenovgrad and one in Plovdiv, but neither of them could accommodate their 62 year old mother. Both daughters rarely visited Elena, because as she described it, her daughter-in-law "did not respect them by offering good hospitality". Elena had two brothers in neighbouring villages, but neither of them could assist her.

Moreover, Elena's son was not able to defend his mother against his wife. He felt threatened by his wife's relatives and for this reason didn't dare to leave her and their two

[113] I asked her to comment on two popular Bulgarian sayings about kinship relations. The first saying I would translate as *"with non-kin you should eat and drink (party) - with kin you should keep accounts"* meaning that one should protect private interests when dealing with relatives. The other popular saying stated that *"kin will not feed kin, but it is dreadful not to have any kin"* meaning that one should not expect generosity and great help from relatives, but on the other hand one is wretched without any relatives. Yordanka totally agreed with the first saying. Then she mentioned that she had sometimes received help from a cousin in the village. Not long ago the man was killed in a traffic accident.

kids. Elena explained how worried he was and that he would often cry in front of her. His wife did not care about him but remained loyal to her parent's family. Elena claimed she stole many things from their house and took them to her mother's house in another village.

Both women asserted that 30 to 40 families in the village lived poorly and hardly made ends meet. They bought entirely on credit. According to Elena and Yordanka, the Roma in the village lived better than most of the poor pensioners. Similar was the self-evaluation of Yordanka, when she compared herself with the Roma. The Roma had received social assistance for the winter season – 5 tons of coal. They sold the coal at a price of 140 BGN/t and this provided funds for celebrating their name days. In contrast, Elena applied for social aid for the winter season, but because her pension was slightly over the official minimum, she did not get any assistance. I had heard of similar cases before. Therefore, defining need on the basis of income alone excluded many needy families and individuals from actual assistance.

Both women told me that they would consider going to a social care institution but admitted that they were ashamed to do so. They shared the opinion that many pensioners lived in the same terrible circumstances – on the one hand, they could not rely on their children for help and on the other – they feared public opinion, "what would people say". In most cases children felt embarrassed and did not allow their elderly parents to join a social care institution. I assume children would not like to admit publicly that they were unable to take care of their elderly parents. Shared morality did not allow them to openly expose their failure to maintain family obligations towards their parents.

The two narratives I recorded reveal fragmentation of kinship networks and breakdown of family integrity. Both cases indicated a lack of family solidarity resulting from dislocated kinship ties between and across generations. Obviously the absence of family understanding was a source of great distress for these elderly village women. Each of them lamented their unhappy living conditions nowadays without being able to see any way out. Fragmented kinship relations, lack of commonality in resource distribution characterized both narratives I heard and described in my fieldwork diary.

This experience led to the following set of questions: are functional kinship networks so important to family welfare? What sort of relation is there between kinship and social exclusion? How could non-functional /distorted family relations influence family (collective) and individual social security? The example of my host family indicated that

functional kinship networks do have an effect on collective and individual social security and wellbeing. In cases where family solidarity was lacking, social security seemed less possible to establish and maintain. I would suggest that this conclusion was valid in cases when children and elderly were involved since these age groups were further dependent on forms of family assistance. As the life stories of Yordanka and Elena demonstrated *expectations* for social security provision *emphasized* kinship help and solidarity. In other words, needs persisted since care was not forthcoming. In contrast Rossi could benefit from her belonging to a well established family clan in Cherven, while Yordanka was not that privileged since she came to live in the village after her marriage. The social exclusion of Yordanka's family I could also attribute to the lack of extended social and family networks in the village that could be mobilized in life critical situation. Similar was the situation of Yordanka's friend Elena who also did not have relatives in the village.

Reciprocal Relationship of Children and Parents

The narratives of Yordanka and Elena were indicative of local meanings attributed to social security. The common element in their stories was the broken relationship between children and parents. Yordanka regretfully confessed her inability to help her two daughters residing in urban areas. Elena spoke of her children – a son and two daughters who could not take care of her. [114] Their words testify to a relationship of reciprocating care and support traditionally formed between the generations. The broken reciprocal connection to their children was a source of great discomfort for both Yordanka and Elena: Yordanka did not managed to provide for her daughters which she experienced as a parental failure while Elena was not assisted by her children in the way she expected. In addition Yordanka's husband was an alcoholic who failed to provide for his siblings which furthermore aggravated the family situation. Elena also suffered the loss of her deceased husband. As a consequence both women sensed a loss of social security deprived of the safety net of kinship and family relations. A sense of abandonment and desperation was felt in their narratives.

Here I would like to cite the opinion of the local doctor. He was an outsider to the village but commuted twice a week to Cherven to take care of his patients. His perception of family relations resulted from his two year long experience in the village. During the

[114] Elena's family situation proved the popular Bulgarian saying *"една майка може да отгледа 10 деца, 10 деца не могат да гледат една майка"* translated as "a mother could bring up 10 children, but 10 children could not look after one mother".

interview, he told me about common practices of family support: in his estimation around 30-40% of the pensioners made considerable savings out of their pensions and sent them to children living in urban areas. This group of pensioners did not spend much money on electricity, water and telephone. They farmed their gardens and land plots and produced enough food for themselves and their families. The doctor explained that by helping their children, village parents felt useful.

Comparing Yordanka and Elena to other pensioners in the village, I assumed that the extent of social security provision depended on how functional family relations and kinship networks were in providing support in life critical situations. [115] In the field I had met other pensioners' couples who also experienced difficulties. However, their stories confirmed ongoing interaction with their children, who often resided in urban areas. Furthermore, I could hear accounts of mutual support as parents and children regularly reciprocated and exchanged resources – labour, food, money, etc. These pensioners did not regard their situation as desperate and dreadful as Yordanka and Elena did.

In the village, I came upon one positive example of fulfilling kinship obligations towards an elderly parent. Baba Latinka, an old widow in her late 70s, had lost her husband about eight years earlier. She had suffered a brain stroke some time ago and for this reason was partially paralyzed. Baba Latinka had been categorized as an invalid of the 1st degree.[116] Thus in addition to her regular pension of 145 BGN she also received a social pension for disability and financial aid for covering telephone bills and medicines. Her medicines cost 40 BGN per month.

Her only son was a businessman in Plovdiv who had prospered financially and for some years intended to build an entertainment family complex in the village – modern cafeteria with a swimming pool with attached mini-market. Since baba Latinka was disabled and could not take care of the house, her son hired a personal caretaker - the sixty year old Radka who commuted daily form Assenovgrad. Radka was generously remunerated – even travel expanses and night shifts were covered apart from the main wage of 130 BGN per month. When the caretaker was not around (on sick leave for example), the neighbour

[115] Elena and Yordanka seemed to be very close and I assumed they had emotionally supported each other in many critical situations.
[116] In Bulgaria people categorized as invalids of the 1st, 2nd or 3rd degree by a special medical committee are entitled to receive a social pension provided by the state.

Gocheto assisted baba Latinka. [117] He regularly went to buy food and medicines for her and every morning came to clean her stove. Baba Latinka was able to cook her own meals, but nevertheless Gocheto brought her some cooked food. Otherwise the caretaker did her cooking and cleaning on a daily basis.

Gocheto was given 100 BGN from the son. In addition his assistance was rewarded by presenting him with conserved vegetables in jars and cabbage. This reciprocal exchange was continually going between the two neighbours: one side provided social services replicating caretaker's duties and the other side reciprocated by financial rewarding and food. This was the one case of explicit reciprocal exchange among neighbours. Surely neighbours in the village had retained their beneficial relationships among themselves. Nevertheless I heard complaints about the limited social interaction and exchange in comparison to what had been the case in the past.

About her relationship with her son, baba Latinka said that she avoided calling him very often. She explained that she did not want to disturb him because *"he probably had a lot to do"*. But whenever she called her son, he and his wife immediately arrived in the village to assist her. The son visited his mother regularly during weekends, often supplying food and other goods for the household. Altogether baba Latinka felt as a happy mother, very proud of her son and his family. She showed me pictures of her close relatives many times during my visits. Their assistance was crucial for her survival and she once admitted that if it was not for the help from her son, she would be *"dust"* by now (figuratively speaking about death and decay of the body). In this case, I could see how assistance was granted because of child-parent kinship obligations but also through other forms of relations evolving out of belonging to one neighbourhood and community. This example demonstrates how social security was established and maintained with the help of family and neighbours. I never came upon other similar family circumstances in Cherven; hence I consider that baba Latinka and her son were an exceptional case. The financial prosperity of the son, allowed for such exclusive care provided to his elderly parent. I contrasted her situation with Yordanka, Elena and another old woman in the village, who complained that her children *"took everything for themselves and did not care for their old parents"*.

[117] Gocheto or Georgi Iliev had been a secretary to the village council (1962 – 1979) and served as a cashier to the farming cooperative until 1990. He claimed to have contributed to the compilation of the only recorded history of the village written by his teacher Vassil Pop Vasilev. I met Gocheto while I was visiting baba Latinka. Then he came to bring her medicines.

Health Status and Social Assistance

Other important themes drawn out of the two stories were related to health status and social assistance. These issues were particularly important for pensioners in the village many of whom had serious health problems. Given the low monetary incomes of villagers, the pensioners were most disadvantaged in cases when they needed expensive medications. For example, Yordanka complained about not getting any social compensation for her deteriorating health problems and not being able to afford treatment. On the other hand, Elena did not receive any social assistance for the coming winter season simply because her pension was slightly over the official threshold.

In the village I came upon other villagers facing similar problems associated with disability who were often excluded from the social services provided by the state: during my habitual rounds to visit the households involved in the Household Budget Survey I met with one elderly couple – the pensioners Nicola and Vaska. They cultivated a small plot just behind their house. In addition they had several hens, a cow and small chickens. Vaska was categorized with disability of the 1st degree. Having this officially proven status, she was entitled to receive around 55 BGN in addition to her regular pension of 112 BGN. She spent around 40 BGN monthly on medications. As the winter season was approaching, Vaska told me they had stored 7 m3 of wood (45-50 BGN/m3).[118] She admitted that having 10 m3 was quite enough but it would cost them 500 BGN in total. In any case, their family was not eligible to receive social aid for heating. In 2005 in order to be considered for a social grant, a person had to receive less than 114 BGN monthly. For a household of two this threshold was 145 BGN.

Another example of people coping with disability and low incomes was the 2-member household participating in the survey headed by Nikolina (born in 1933). Nikolina was a widow for around 9 years at that time, living with her fifty-five year old son Boian. The son was unemployed. Nikolina and her late husband were native residents of Cherven. The

[118] Usually in October and November all village households started their preparations for the approaching winter season. Because of the high expenses associated with gas and electricity many households preferred using wood and coal for heating. The permanent residents of the village were entitled to a certain amount of firewood chopped from the nearby forests. The normal procedure required segmenting the available forest into different plots and then arranging a lottery among different households grouped either by residential areas (neighbourhoods) or along kinship and family lines. Normally one such group consisted of 5 persons who would get together to draw a lottery and have an allowance of 5 trees per person or 25 trees per group. The price of the wood was determined by the local village council. Usually the male members of the household from each group went together to the forest. It was more expensive if someone was hired to chop, collect and transport the wood.

house (52 sq m) in which Nikolina and her son lived presently was built in 1979 by her husband.

The husband was an army officer and had a job assignment in Vratsa for some time. Then Boian, a 9 month old baby, had gotten ill with encephalitis. After incorrect medical treatment, he had remained paralyzed and had retarded development. Nikolina had been a housewife all her life and was not able to take up any kind of occupation because she took care of her disabled son. Because of anxiety over her son's disability, Nikolina contracted tuberculosis peritonitis 4 times. During socialism the son had worked at an enterprise specialized for invalids called *"Напредък"* (translated as *Advancement*) and there he had met his wife (a woman without disabilities who was raised in an institutionalized orphanage). Together they had one daughter. Later the family split and Boian's wife together with the family of their daughter lived in Plovdiv. Apparently they were not officially divorced and had kept good relationship over time. I heard that the daughter with her family (husband and two daughters) came regularly to visit her father and grandmother.

For years Boian remained in the village with his mother. The mother would get 165 BGN pension and the son, who was categorized as an invalid of the 3rd degree, was getting 82 BGN as a monthly social pension. The family had some land in the cooperative. In the garden (300 sq m) surrounding the house Nikolina grew different kind of vegetables and fruits. There were small number of animals – 7 hens, and two chickens. Nikolina regularly preserved food for the winter season – a common practice among Bulgarian villagers and urban dwellers. The preserved food was shared with the family of her son in Plovdiv. In March the hens had laid 10 eggs which Nikolina had set aside for the family of her granddaughter in Plovdiv. For the 1st of March she had made *martenitsi* for the family and had as well sent them to Plovdiv.[119] Nikolina complained that their household income was not enough to maintain the living standard she was used to: "*During socialism we did not live in great luxury, but such poverty we had never experienced before. We always had been able to afford basic necessities – medicines, clothes, food, heating."* Medicine related-expenses were a large part of present household expenses, for example Nikolina spent 27 BGN on medicines each month. In addition her household needed 10 cubic of wood for the coming winter season (2005/2006) which amounted to 500 BGN.

[119] Celebrating the 1st of March is Bulgarian tradition connected to welcoming the upcoming spring and revival of nature. People exchange *martenitsi* (small decorations traditionally made of red and white yarn) wishing each other good health and prosperity.

At this point, I need to add a few sentences about the provision of state supported social services in Cherven. The secretary of the Mayor told me about 50 low income households who were entitled to receive social aid for the winter season in 2005. The previous year the number was the same. Almost half of the recipients of this type of social aid had a degree of disability. The social worker usually came to Cherven once a month to pay visits to the households, claiming social assistance. Then the social worker evaluated each of the cases individually on the basis of total income and household size, degree of disability, relation of age and income. The aid grant consisted of coupons valued at 160 BGN in exchange for which in September the villagers received 1 ton of coal.

In the framework of the government program for social integration from 2005 all categories of disabled people, regardless of their incomes, received fixed amounts of financial assistance for covering expenses for telephone, transportation, medications, and food. As I was able to observe pensioners were not satisfied with this level of social security provision; the average pension in the village was approximately 50-60 BGN, so most of the pensions did not exceed 100 BGN.[120] From this income many pensioners had to pay around 30-40 BGN monthly for medications.

In 2005 the number of officially certified disabled villagers was approx. twenty, according to the secretary of the Mayor. Any officially proved status of disability granted access to a higher pension. When I went to visit my hosts during the Christmas break in 2006, they told me that the number of categorized villagers had reached approximately one hundred.[121] They suspected this increase in the number of disabled people in Cherven resulted from corruption in the medical committee. Why did so many villagers apply for disability status? Was it so easy to manipulate the social security system? The reason for this increase was the newly introduced social programs. According to the new plan enforced from 2006, a disabled person was entitled to use the services of one caretaker from the family. If this family member was unemployed, then the care for the disabled relative was counted as official employment at minimal wage. Therefore, people with official disability status, had access to a higher social pension, in addition to being able to secure employment for a family member.

[120] The pensions in Bulgaria are estimated to be the lowest in Europe.
[121] I was not able to confirm this number through official channels.

Social Security, Property and Inheritance

Another common theme with social security implications present in the life stories was related to house possession and maintenance. The importance of the village house was noted by Irwin Sanders (1949:21-42) who described in detail the rituals accompanying the building and maintenance of the house. Various activities related to the household – producing and sharing food, celebrating and inviting guests, informal meetings with relatives and friends – were still centred on the house. Therefore, the house was the *personalized space* where kinship and social networks were maintained and put into use.[122]

The doctor had also explicitly considered the family house to be an element of social security in Cherven. He confirmed the significance of the village house with the surrounding plot of land – *"gradina"* (garden) to the wellbeing and reputation of the family. Families with large gardens had higher social status among their fellow villagers: wealth was measured by the size of the garden. Hence many efforts were directed at maintaining the garden: *"in the village you need place for expansion and development – that is the habitual mode of thinking"*, explained the doctor. Working the garden was thus related to being able to provide food for the family and have additional revenues from market sale.

Traditionally the house in Bulgarian culture was associated with the family and certainly was an attribute of social security. The sociologist Raichev and Stoychev (2004: 62) noted the high percentage of Bulgarians (according to their estimates – close to 90%) owning their home during the socialist years. In addition I. Znepolski (2008: 232) pointed out to a similar trend in other countries of the European Union – Greece, Portugal and Spain. He explained this phenomenon was characteristic of underdeveloped and poor southern societies, in which the ownership of home guarantees social survival.

As the example with Rossi, Iliya and their close siblings indicated the provisioning of a stable home for sons and their future families was arranged far in advance and still remained one basic obligation of parents in close village communities. On the other hand, Yordanka regretted the fact that her daughters had to rent a place in the town instead of having their own flats. She also complained how threatened she felt by her husband's relatives who disputed the ownership of their village house. Similarly Elena felt under

[122] In Cherven, the house, apart from being a family symbol, was perceived as a valuable property. As noted in the 2nd Chapter due to the good location of the village (proximity to urban areas) acquiring a house was relatively expensive as on average properties (houses with garden plots) cost between 20 000 and 30 000 BGN.

pressure from her son and daughter-in-law who wanted her to get married again and move out of the family house. Elena and her deceased husband had built this house after earning money from tobacco cultivation during socialism.[123] In the critical situation, Elena's siblings, two brothers and two daughters could not offer her suitable accommodation and thus she was pressed to continue living in a small room with a collapsed roof. Hence, Yordanka and Elena had both expressed their insecurity arising from the threat to lose the roof over their heads. Their negative examples pointed to the relevance of the house as a source of valuable security.

Social Security and the Morality of Work

How was attitude toward work related to social security and the categories of need and care? In this particular situation, I suggest that work was associated with care, and needs were satisfied through investing efforts and managing resources. This was the proper way of doing things that dictated the normal course of life and defined life achievement. Rossi's house was an outcome of combining hard work, frugality and family solidarity. It was the visual result symbolizing all these values. All these elements were not present in Yordanka and Elena stories. The contrast made both of them feel unequal and excluded with respect to community.

Fragmented family relations induced bad reputation and disjointed relations within the community. This aspect of the social interaction I came to notice when I discussed Yordanka's case with my host lady Rossi. I remember that she commented on one occasion that improving your living conditions was a matter of ingenuity, resourcefulness, and inventiveness. So she clearly blamed the villagers who did not take care of their houses, did not improve their living conditions. Commenting on Yordanka's family she could not hide her surprise and disdain at such negligent attitude towards the house and household affairs. Referring to Yordanka's complaints, Rossi told me: "*no one could be hungry in the village"* meaning that if one was a hard worker he/she could earn and produce enough to feed the family. Only lazy people complained and there was no excuse for them. Therefore Rossi clearly marked one category of the "undeserving poor".

Clearly Rossi was blaming Yordanka for not working hard and investing in the house. Rossi furiously claimed Yordanka stole produce from other people's orchids. Often

[123] As I have noted earlier, tobacco was a major source of revenue for villagers - during 1950s and 1960s many families had built and furnished their houses due to profits generated from tobacco.

Yordanka bought on credit and once she tried to avoid paying back her debts at the grocery shop. She used tricks to get away from responsibility and hard work, always making excuses with her illness or old age. Rossi was not taking these excuses seriously and definitely was not sympathetic to Yordanka's miserable lifestyle and poor family conditions. Rossi contrasted Yordanka's "relaxed" lifestyle with her own responsibilities in the household – having to raise two children and at the same time working hard in the family farm.[124]

Yordanka's complaints of poverty and need were automatically associated with laziness, theft, and moral deprivation. I could see how Rossi overvalued work, emphasizing it as an exclusive factor leading to prosperity and family welfare. Was the habit of working hard so important in achieving prosperity and social security in the village? On what basis could people claim inability to work, and would their claims be trusted? Rossi obviously was not aware or did not believe how ill Yordanka was. She said she could accept an excuse for disabled people, but for her Yordanka definitely did not fall into this category.

When I try to further analyze Rossi's reaction I formulate the following set of problems: why did Rossi exclusively blame Yordanka for what was happening in the family? She must have known that her husband was an alcoholic. Nevertheless, her accusations centred only on Yordanka's misbehaviour. To resolve these complicated issues, I should discuss the gender dimension in this family crisis. As I pointed out earlier in this chapter, the traditional understandings of the role of women in the patriarchal family justified her subordinate position with respect to males – brothers, father, father-in-law, and husband (Sanders 1949: 96). Yet, women were generally expected to manage household affairs, while their husbands concentrated on earning money. In this case, a wife was expected to direct the efforts of her husband for the wellbeing of the family using her skills to manage resources and having power over her husband's behaviour. If the family was not well provided for, and its needs were not satisfied, this negligence was assumed to be a woman's fault.

As the previous examples indicated, family assistance and social security were linked to work and moral judgments of people. In this way people who were able to manage their resources (money, property, land, connections, skills, etc.) for the benefit of their families were highly esteemed. On the other hand, individuals who by some chance failed to

[124] All these allegations against Yordanka I could not prove or confirm.

provide for their families and did not make efforts in improving living conditions (investing in the house, for example) were reproached and regarded with disdain as the example with Yordanka showed.

From Rossi's comments, I assumed that the concept of work was central in the common morality of the villagers. Possibly judgments about people were partially based on how diligent workers they appeared to be in addition to how much they saved and invested in the family property. In an interview, the local doctor explicitly stated that in Cherven being lazy was considered to be among the worst qualities in a person. Villagers believed hard work to be essential and hence nothing could be achieved without working hard. Senior generations were accustomed to field work, and to an old age farmed the land not sparing their efforts. One of the harsh consequences of working in the fields for elderly villagers – eye cataract – resulted from constant exposure to sun light. It was this illness the elderly villagers feared most since the treatment required a costly operation. According to the doctor the local people took their health problems very seriously. In their understanding good health was a prerequisite to being able to work in the garden or farm the fields – perform hard physical labour. For that reason poor health was believed to be a great misfortune since this condition prevented people from working hard and providing for their families. Anthropological discussions on rural communities similarly underlined the link between work and local identity (See Sanders 1949 and Kaneff 2000 & 2002 for Bulgaria, Pine 1996 & 1998 for the Polish case and Verdery 1999 for Romania).[125]

Conclusion: the Significance of Kinship and Social Networks in Social Security

In this chapter I focused on various examples related to kinship-based social security, mostly dealing with the reciprocal relationship of obligation connecting generations of siblings, and investing in property (inheritance). I indicated how kinship and community relations (e.g. neighbourhood) to a great extent complemented state social services and thus have become an important institution of social security provision (Thelen and Read 2007).

[125] In pre-socialist times Sanders (1949: 147) pointed to values held in high esteem in Dragalevtsy: "*land ownership, hard work, frugality, premarital chastity, observance of some of the more important religious rites, and being a good neighbour*". Sanders (Ibid: 49 – 51) additionally explored local attitudes towards work among Dragalevtsy villagers. His respondents explained that farming was considered a heavy type of work and hence young people preferred becoming artisans and doing easy work rather than continuing the farming occupation of their fathers. Once industriousness was held in high esteem because farms were big and people were accustomed to hard work. With the decline in the size of land holdings and domestic animals, farmers spent less time working in the fields and gradually lost their habit of working hard. Therefore Sanders's informants differentiated farming from other types of occupations as being the most heavy and undesirable type of work in Dragalevtsy.

I need to return to the introduction of the chapter and emphasize the meaning and functions of social security during postsocialism. I refer to Haney (1999) and her description and analysis of the Hungarian welfare regimes. Haney demonstrated how the purpose and meaning of social security for children and mothers provided by the Hungarian government changed as the ideology of neoliberalism was introduced. During socialism the official definition of need was based on the collective identity of motherhood. This definition was all-inclusive because it applied to broadly defined categories of mothers – professional women, housewives, students, regardless of family income. After the political changes in the 1990s, the need was redefined and closely related to family income. The new emphasis on income and domestic consumption replaced to a larger degree the attention previously given to the psychological problems of the family members. This way of defining need was so exclusive, that many mothers – welfare recipients – felt humiliated and socially degraded. In this way the new definition of need reinforced social inequalities and distinctions by stratifying Hungarian families into clear-cut class categories.

I would suggest that Bulgarian social welfare system experienced the same shift from inclusive to exclusive definition of need, especially with respect to social security provided to families and children. During socialism the state sought to homogenize all citizens through sponsoring the general living standard. In the postsocialist state, regulations concerning social security emphasized the level of income and previous employment record. As my observations indicate, this legal framework of social security exclusively based on income and consumption, leaves many families and single individuals without actual help and social assistance. Therefore, I could claim that there are some similarities in the way Hungary and Bulgaria reformed their welfare systems. As a result the distribution of social aid had become associated with exclusion and social deprivation which to a great extent stigmatized the recipients of such help. In addition such reformulation of eligibility as in the Hungarian case reinforced social distinctions and inequality. As state provided social security shrank to cover only categories of socially excluded people, the social polarization became more evident with the emergence of the new rich.

Obviously in Cherven among the vulnerable social groups at risk of social exclusion were the pensioners. The official social security system defined need on the basis of income and health status. Hence low income households of pensioners received social assistance for the winter season. The officially proven status of disability also granted access to social benefits. These two examples – social assistance for the winter season, and disability

pensions – were the most explicit illustration of how state determined and assisted the social groups at risk of social exclusion.

I could conclude that social security in Cherven is viewed as a collective achievement in which kinship reciprocal obligations provided the means to satisfy current needs. Interpreting this situation through the model of social exclusion/inclusion proposed in the thesis (Anglo-Saxon vs. French definition) it is clear that collective rights were given priority over individual rights and strategies of adjustment. The social security (and social integration) of each individual to a great extent depended on his/her relationship to the family and kinship group – to that collective entity he/she is part of defined by birth and marriage. In the chapter I have provided examples to demonstrate how the accessibility and functioning of kinship and social networks could influence individual and collective aspects of social inclusion and social security. Thus my informants' experiences suggested that social security was hard to attain if kinship networks were fragmented and reciprocal obligations disrupted.

Traditional understandings of kinship and family solidarity reinforced by the legacies of the socialist system had promoted interdependency and discouraged individual life strategies. Various current factors (e.g. low qualifications, unemployment, low monetary incomes, etc.) solidified this dependency on kinship and family support. In this situation the kinship and social networks have been revalued as a sustained form of social capital, granting access to resources that could be mobilized in critical situations.

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Chapter 7

LOCAL POLITICS: ASPECTS OF POLITICAL AND SOCIAL INCLUSION/EXCLUSION

Introduction

In this chapter I would like to address the inclusion/exclusion theme in the context of political activity in Cherven. Naturally my focus will be social and kinship networks granting access to political representation, power and social influence in the community. I would also like to consider these issues more generally, connecting local actors to national events and processes. In this line I broaden the discussion in this chapter to include questions related to elite formation and continuity viewed through the parliamentary elections of 2005.

The dichotomy "individual" vs. "community" is one of the important reference points in this chapter. Naturally this dichotomy is especially relevant to the overarching theme of inclusion/exclusion since it represents the sort of tensions the Bulgarian society had been struggling with throughout its social, political and economic development. In my analysis I consider the problem of individual progress in a culture heavily influenced by collectivist attitudes as fundamental in understanding the current situation in Bulgaria.

Irwin Sanders (1949) described many aspects of the rural society in Bulgaria, referring to kinship relations, civil society, attitudes to land, labour and money. In the preceding chapters I have already addressed these topics referencing his work. Sanders represented rural Bulgaria prior to the establishment of the communist regime. He then reflected how politically-minded the villagers in this particular time frame were:

> "But the peasants were little interested in fighting for political rights; these were individualistic and not in keeping with familism, which emphasized the welfare of the group rather that the rights of the individual. (…….) They did not feel that they, and millions like them throughout Bulgaria, had the power to control many things affecting their daily life" (Sanders 1949: 177).

This passage marks the opposition collectivism (familism) vs. individualism – a theme running throughout Sander's ethnography. Relating this opposition to inclusion/exclusion and the two relevant approaches – French vs. Anglo-Saxon, I argue that during socialism the political and social integration/inclusion prioritized collectivism (familism) over individualism. In other words, personal advancement in the Bulgarian society (social inclusion) depended to a great extent on family affiliation and social background (group membership) and less on individual abilities and credentials.[126] In this way kinship and social networks were a decisive factor in inclusion/exclusion processes during socialism. Individuals with advantageous kinship/social relations, associated favourably with the prevalent socialist ideology, were promoted sometimes regardless of their talents and abilities. Party membership, for example, was valuable political capital as was family lineage related to worker/peasant background (Kaneff 2004).

Sanders perhaps associated political rights with civil rights and liberties that were presumed to be individualistic (Anglo-Saxon approach). In the case of Bulgarian villagers he noticed how the culture of familism promoted "group welfare" rather than "rights of the individual". It was indeed a true observation since during socialism not only the single individual but the whole family/kinship group he/she belonged to was excluded/included depending on the relationship to the socialist ideology promoting peasant/worker over bourgeois ancestry. In this chapter I would like to address another aspect of social exclusion through kinship and social networks regarding national politics and ideology. What is the family contribution in the successful career of a member? How relevant is the social and political status acquired in the past for determining individual success at present? Who are the new business and political elites? How are the forms of social, political, cultural capital related to national and local politics and elite formation?

A Brief Remark on the Contemporary Political Parties in Cherven

Before addressing the aforementioned questions it is useful to briefly introduce the current political reality in Cherven. The village had traditionally been described as a "red village" – this epithet owing to the many communist/socialist supporters. In the early 1990s in Cherven three popular political formations were represented: the Bulgarian Socialist Party (BSP) with 380 members in the village, the United Democratic Forces (UDF) with around 20-30 members and the Bulgarian Agrarian People's Union "Alexander Stambolijski" (BAPU) having as many

[126] The lack of connections had forced many talented young people out of Bulgaria, said my informant Radka (see Chapter 4).

as 20 members. Of all the three parties, mentioned above, only BSP still had a formal structure in the village. According to the Mayor, in 2005 the members of BSP amounted to 62-63 people.[127] He explained that BAPU and UDF which also had local clubs in Cherven had gradually lost their supporters by not being able to find suitable leaders. Obviously, BSP members in Cherven had always prevailed and this could be considered as additional evidence to the pro-socialist support demonstrated in rural areas. Others have noted similar pro-socialist tendency in rural Bulgaria – Creed (1999) for north western parts and Kaneff (2004) for north central parts.

In brief, the Bulgarian Socialist Party (BSP) is the renamed heir to the former Communist Party. The United Democratic Forces (UDF) was a right-wing political party established immediately after the demise of the socialist political system in Bulgaria. Throughout the postsocialist period, UDF was considered to be the main political opponent to BSP and had acted as political opposition in cases when BSP was in power. Since its foundation as a national political organization, UDF underwent several splits attributed to leadership disputes among its party elite. As a result, the supporters of the right-wing democratic idea had to divide their loyalties among the emerging splinter parties. The Bulgarian Agrarian People's Union (BAPU) "Alexander Stambolijski" was founded during the pre-socialist period as the Party of peasants in Bulgaria. Unlike many other pre-socialist parties, BAPU continued to be politically active during socialism.

I emphasize that two other major political parties were not represented in Cherven in contemporary times (2004/2005): the National Movement Simeon II and the Movement for Rights and Freedoms. The lack of supporters in Cherven is explained by the distinctive identification of these two parties with special social clusters. Thus, the National Movement Simeon II[128] was identified with the urban-styled young professionals ("yuppies") trained in the West, who were part of the former government and who to a great extent determined the public image of the Movement (Filipov 2001). This image, however, did not appeal to the rural population which explains the unpopularity of the party in Cherven. The other party which did not have representatives in Cherven was the Movement for Rights and Freedoms (MRF). This party, founded immediately after 1989, attracts large numbers of Bulgarian

[127] For comparison, the total polulaiton of Cherven is approximately 802 permanent residents.
[128] As the name suggests, the establishment of this political formation was prompted by the desire of the Bulgarian king, Simeon II, to participate in the political life of the country. The Movement was founded prior to the Parliamentary elections in 2001. It won the majority of seats in the Parliament which enabled it to form a government (headed by Simeon II) in alliance with the Movement for Rights and Freedoms. As political ideology and policy action the government embraced the tenants of neoliberalism as its guiding principles.

Turks.[129] In Cherven there were no permanent residents of this ethnic group which explains the lack of formal political structure for MRF. In contrast, MRF has a solid rural base in other mixed villages in the vicinity – Muldava and Topolovo.

Leaders and Power Brokers in Cherven: the Relevance of Kinship and Social Networks

During the course of my stay in Cherven I was able to take notice of the strong support for the Socialist Party in contemporary times. Most village leaders claimed to be adherents of the socialist values and some were still active members of BSP. The village Mayor and the Head of the agricultural cooperative had been among the long-standing socialist supporters. The Mayor had a strong connection with the Communist Party from the past when members of his family *Tochevi* had gained political power as part of the village communist elite.

During an interview, the Mayor told me that the Communist Party and the Bulgarian Agricultural National Union had a long history of support in Cherven. Many villagers, including my host family, still considered its successor, the Socialist Party, to be the only socially responsible political organization capable of improving the situation in Bulgaria. In other words, BSP has managed to legitimate its presence in the postsocialist political landscape in Cherven and could claim to have retained the social trust of the village inhabitants.

One plausible explanation for the long-standing pro-socialist support in rural Bulgaria after 1989 is offered by Gerald Creed (1999). He describes the insecurity of the Bulgarian villagers about their proper place vis-à-vis the global economy and the new world order. The transition is described as a painful process of *renegotiating identities* and *discovering a sense of global marginalization*:

> "In 1990s villagers talked constantly about their place in the world, questioning whether they were indeed "European" and "Western" or rather "wild," "oriental," "aboriginal," or "mixed," to name some of the recurrent alternatives. They often elaborated on how these identities impeded or foreclosed the possibility of transformation. Supporting the Socialist Party was a way to resist the political, economic, and cultural hierarchies defined by global capitalism or, more precisely,

[129] *"Movement for Rights and Freedoms"* is publicly recognized and accepted as the party of the Bulgarian Turks. It was established after 1989 as a reaction against the massive repression of this minority group during socialism.

> to claim exemption from those rankings even while participating in the capitalist world" (Creed 1999: 235).

In other words, in their attempt to re-evaluate their position with respect to the world, villagers demonstrated their support for the Socialist Party as a way of reinforcing their social identification and ascertaining their social participation (inclusion). In this passage Creed makes clear how this political stance (pro-socialist attitude) is a reaction against the total political, economical and cultural devaluation (exclusion), characteristic of the rural areas in Bulgaria.

My observations in the village also reflect and confirm the enduring pro-socialist legacy. The difference is that pro-socialist attitudes were no longer dominant in the sense that lately socialists (former communists) faced the competition of other parties and political formations in Bulgaria. Nevertheless, I have enough evidence to claim that former Party elites in Cherven had managed to preserve their social reputation, influence and status. The way local-centre relationships and networks were constructed and utilized in the socialist period was described by Kaneff (2004). During socialism the local political elites in Talpa (a village in north-central Bulgaria where she conducted her research) could connect to the state centre through networks established by shared history and Party membership. In such a manner they could gain privileged access to resources used for the benefit of the community and become politically legitimate and included. In analogous way in Cherven the family of *Tochevi* - prominent Communist leaders and supporters – has always been an extremely prominent family that has retained its social position of leadership and influence locally. In support of this claim I could point to two relevant examples – the Mayor and the restaurant owner Peter both belonged to that influential family and carried the family name. Stefan Tochev was also a prominent community figure during socialism and after. He was chiefly connected to the development of cooperative farming in Cherven. In other words, I could observe a marked continuity in elite composition: the members of the postsocialist political and economic elite in the village were once closely affiliated with the Communist Party which helped them accumulate social capital and in some cases transform this capital into economic and political assets. Further evidence for the consistency in status of *Tochevi* can be traced back to the pre-socialist times - the grandfather of the restaurant owner Peter held a property in the centre of the village (where is now the family restaurant) which suggests his distinguished position in the past.

At present a strong proof of the long-standing pro-socialist support in the village could be found in the local elections for a Mayor – Nikola Tochev was a socialist candidate who had

been re-elected to serve for three consecutive terms in Cherven. As a member of the politically leading family he presumably had access to an extended kinship and social network that could be mobilized during election periods. Recently the Mayor faced the competition from one of the enterprising families in Cherven – the spouses Diana and Mitko (introduced earlier in relation to rural tourism). They were as well major opponents of Peter Tochev – another family member - in the sphere of tourist business. As I have already demonstrated hotel complex "Diana" was the first of the three family enterprises with similar orientation in the village. Notably Mitko and Diana on two occasions participated in local elections, as each time Mitko ran for the Mayor's office in Cherven, while Diana aspired to the same position in the municipal centre Assenovgrad. In contrast to the Mayor, however, neither of them could benefit from family affiliations in the village. Therefore besides his political association with the Communist Party, the Mayor had the advantage of being part of well embedded kinship group with a long history in the village. Therefore processes of political inclusion/inclusion depended on and were determined by kinship and social networks and the accessibility of such networks in the village.

Due to their long-term social and political involvement with community affairs, *Tochevi* could be said to have made considerable investments in the village community and its development. Presently these investments have yielded positive returns and helped establish the family once again in leadership positions. There was yet anther important factor to be considered in the matrix of inclusion and exclusion – insider vs. outsider perspective. The local doctor (a resident of Plovdiv), after having served for two years in Cherven, admitted he was still considered as an outsider. Thus he claimed that it would take time for villagers to accept somebody not belonging to their community. Naturally villagers were very suspicious of any outsider but after some time of prolonged interaction, they could accept the outsider to a certain extent, "*not as one of them, but as a very close to them person"*, as the doctor put it. In this context Mitko and Diana were definitely treated as outsiders who could not be fully trusted and relied upon. This situation could be associated with the idea of defining Bulgarian culture as a *low trust culture* (Chavdarova 2001; Roth 2007). In such cultural settings kinship and personal networks compensate for the lack of systemic trust (impersonal trust) in the society. Therefore this cultural explanation could also be validated in the case of Mitko and Diana and their exclusion from political and social prominence in Cherven.

In brief there is an implicit continuity in the village elite traced mainly across kinship lines during different political periods – pre-socialist, socialist, and postsocialist. Ultimately this continuity signifies the consistent effort of this rurally based family, *Tochevi*, to successfully

adapt to new social contexts created with each successive change in political system. I will refer to Boissevain (1974) in introducing the analysis of social networks:

> "It is well to note at the outset that this social environment is partly ascribed and partly achieved. That is, by virtue of his position in society – birth, rank, job, race – part of a person's environment is given to him gratis; and part he constructs, sometimes carefully but often haphazardly, to suit his purposes and personality. His interaction with this social environment is neither wholly self-determined, nor wholly predetermined. He is not only constrained and manipulated by his environment; he also manipulates it to suit his interests" (Boissevain 1974: 27).

The next sections suggest how people can manipulate their environment in order to achieve their long-term goals in relation to politics. The case I am going to describe took place in the context of the parliamentary elections in Bulgaria in June 2005. For more clarity, I will make a general overview of the pre-election campaigns of political parties in national and local perspective.

A Brief Overview of the Parliamentary Pre-election Period [130]

The pre-election period in Bulgaria was marked by intensive public relations campaigning – television advertisements, posters, special events with political message, etc. What appeared to me to be the common motive of all parties' campaigns was the appeal to the younger generations. "You build your future" was the slogan of the Coalition for Bulgaria, broadcast every evening on the national television. The Bulgarian Socialist Party was part of this broad coalition featuring also the Party of Bulgarian Social Democrats, the Political Movement Social Democrats, the Bulgarian Agrarian People's Union "Alexander Stambolijski", the Civil Union "Roma", the Movement for Social Humanism, the Green Party of Bulgaria, and the Communist Party of Bulgaria.

The political parties in Bulgaria were getting aware of the increasing political indifference of the electorate. Ineffective reform policies provoked enduring disappointment among adult voters. For that reason the pre-election designed and managed campaigns targeted the young

[130] For a political analysis of the 2005 parliamentary elections see Europe and the Parliamentary Elections in Bulgaria, 25th June 2005 (http://www.sussex.ac.uk/sei/documents/epern-eb-bulgaria_2005.pdf) published by the European Parties Elections and Referendums Network.

voters. Young people were addressed by political clips, containing images of young professionals. Famous pop-singers also appealed to young audiences on behalf of *Novoto Vreme* (translated in English as "the new time" in the meaning of "the new age") - a new political formation claiming to represent the voice of the young and successful professionals in Bulgaria.[131] These initiatives aimed at stimulating young people to vote and fight political apathy.

Another common strategy of the politicians was a constant appeal to national symbols portrayed as embodiments of national spirit. These patriotic politicians went to visit monasteries and famous monuments as part of their political pre-election program. A newly formed political formation, the National Union "Attack" (*Ataka*), made a distinctive use of the national sentiments in a provocative but highly successful campaign. This formation appeared as a coalition of three different parties: the National Movement for the Salvation of the Fatherland, the Bulgarian National Patriotic Party, and the Union of Patriotic Forces and Military of the Reserve Defence. Occasionally portrayed as extreme and radical by the Bulgarian media, the political leader of the National Union Attack disturbed journalists and other politicians with his dramatic rhetoric in defence of the "Bulgarian national interests". He portrayed the ruling parties – the National Movement Simeon II and the Party Movement for Rights and Freedoms - as betraying the interests of the nation to foreign influences and financial circles. Consequently, these and similar accusations attracted many voters among the disillusioned Bulgarians. The radical political stance of *Ataka* provoked some journalists to compare it to a neo-fascist movement, although this label was constantly denounced by the leadership of the Party.

The third common theme in all parties' campaigns was the regular claim that the common social problems (e.g. unemployment, deteriorating public health care and social security systems, etc.) could be remedied by the respective parties' political platforms. Addressing the persistent social crisis was not a new campaign strategy. During past pre-election periods, traumatic problems had been raised to the public attention and then slowly pushed aside after the elections. Similarly during the pre-election stage in Cherven, the Mayor and other officials from the municipality of Assenovgrad initiated one important infrastructural improvement – building of the village sewerage system. This project had been postponed for too long. However, the coming elections prompted some belated action. In their attempt to win the villagers" support, public officials demonstrated how much they considered the needs of the

[131] *Novoto Vreme* was a new political formation in Bulgaria having no official structure in the village.

villagers. As soon as the frenzy of elections subsided and the quiet monotony of the everyday life regained dominance, the construction work of the sewerage was terminated. According to the Mayor of Cherven, initiated infrastructural projects had been similarly stopped in the neighbouring villages and all across the country. The problem was that the total costs of the construction in Cherven amounted to 130 000 BGN. *The Ministry of the environment and water resources* suspended the financial support of these infrastructural projects everywhere. When interviewed on this subject, the Mayor had no clue when and how the sewerage construction in Cherven would possibly start again. The villagers, to whom I spoke about this unsuccessful endeavour, considered it political propaganda. They were once again disappointed by the state and its representatives as the belief in the state institutions evaporated irreversibly.

Pre-election Political Activity in Cherven

Villagers in Cherven were subjected to active pre-election campaigning. The first special event was organized by the Bulgarian Socialist Party on the 17th of June. The village chitalishte hosted the meeting of the Socialist Party candidate, Maria Valkanova. The event was accompanied by a pensioners" choir performance from Assenovgrad but nevertheless provoked little interest among the villagers. Only about 20 villagers attended. My host family did not hide their firm support for the Socialist Party. Their old parents were also in favour of the socialist candidate. In their view, only the Socialist Party represented the interests of the rural population in Bulgaria. From the family only my hostess attended the meeting of the BSP candidate and later told me she was going to vote for her.

The second pre-election event was organized by a newly found political formation *Novoto Vreme* (NV). More generally the leadership of NV consisted of ex-members of the ruling King's political formation (the National Movement Simeon II) – the big winner in the parliamentary elections of 2001. For various reasons these former members decided to split and subsequently form the next in the row of many splinter parties "emerging" out of the democratic political space. *Novoto Vreme* organized their event on the 19th of June, inviting the villagers for a drink at the restaurant of Peter Tochev. It was a pleasant summer evening when villagers gathered around the tables in the open air in front of the restaurant. Following a short projection of pre-election clips, the meeting started with a brief introduction of the three young candidates for the region. It was quite obvious that the attitudes of these young urban-styled yuppies were in conflict with rural identities and lifestyle. The villagers did not feel any connection to the candidates; no single question was addressed to them. Later on the Mayor commented in private that the candidates were too young to know how to "make

politics", meaning dealing with complicated matters in political context. My impression was that no one took them seriously since the audience did not react by asking questions. One of the candidates was the son of a prominent and wealthy villa owner in the village. I will use his case to demonstrate how kinship networks grant access to political resources and further influence the processes of political inclusion and exclusion.[132]

It is worth highlighting the spatial dimension of these two pre-election visits. The candidate of the Bulgarian Socialist Party organized the event in the Chitalishte. Thus, she established a link from the past (socialist based) to the present (pro-socialist) legacy of the village. Her visit in the chitalishte marked continuation in the uses and functions of this institution, characterised in terms of state-supported cultural and political activities during socialism (Kaneff 2004: 157-160). In contrast, the setting for the other pre-election visit, organized by *Novoto Vreme* was a family run restaurant. This place was symbolic of the new entrepreneurial activity in the rural areas of Bulgaria, a marked victory of the market-oriented anti-communist ideology. Moreover, the spatial dimension of the political event as well as the main actors involved politically legitimated the new postsocialist elites – the elites of entrepreneurs and property holders. In a sense the two parties wanted to associate themselves with the positive developments in the village – BSP had supported and emphasised the chitalishte as a centre for community life, while NV had drawn attention to a modern newly developed family run restaurant – an implicit triumph for the anti-communist, market-oriented governments. These pre-election events demonstrated how the public space in the village was politicised and used by distinctive political regimes: pro-socialist and neoliberal. In the memories of the villagers, the Chitalishte was associated with the positive side of *community life* under socialism. Peter's restaurant however stood as an implicit statement in favour of neoliberal ideology: it emphasised the *individual achievement.* In this context, the dichotomy *community vs. individual* acquired new political meaning.

How Kinship-based Elites Managed to Transform Their Economic Capital into Present Day Benefits

The example presented in this section demonstrates the successful intersection of several domains: kinship, politics and business. Through this example, I show how one family makes use of political and economic resources at its disposal to gain social and economic status. The setting of this story was the pre-election campaign activity in Cherven prior to the

[132] I managed to attend the pre-election meeting of *Novoto Vreme* – I knew about it far in advance from my informant – the restaurant owner.

parliamentary elections in June 2005. Against this background I made several observations in relation to the importance of kinship and social networks in granting access to political representation (inclusion).

I know the details of this story from my host - the policeman. He had a close personal relationship with the family involved. The story and the manner it was told demonstrates the mode in which state politics was represented and experienced at the level of the village community. The merging of politics and business in the explanations of my informant was characteristic of the way the political environment was understood and reflected upon. For my research it was valuable to take account of the local perspective and see how my informant made sense of this event.

The father of the MP-candidate from *Novoto Vreme* was a very prosperous businessman. In the story that follows I will refer to him as K. K owned a massive building in the village, intended to be a summer residence house for his family. He was often seen chatting with villagers in restaurants, going for a visit to his friends in the village or inviting guests in return. K also actively participated in hunting activities, organized by the villagers in Cherven.

K had started his business – setting billboards along the major roads and offering advertisement space - after the changes. At the very beginning he had only 3 huge competitors. Gradually he expanded his venture by acquiring billboards placed at strategic locations – at entrances and exits of big cities, along main highways and on central cross-roads in towns and cities. He purchased spots at different locations for a certain period of time where he would set up billboards. He offered the boards to potential clients and the tariff depended on the centrality of the board, the duration of the display. The son's involvement in the business was significant. He was expected to take over the profitable family enterprise together with his sister.

For his expansion across the country K depended on the respective municipalities and Mayors for granting permission to set up billboards at particular locations. He often complained about the corruption he encountered at every level of the municipality administrations. Unfortunately K could not so far establish himself on the territory of the capital – Sofia. There he had powerful rivals, including the former Mayor of the capital who did not allow access to other competitors. I was told that many politicians, including the former Mayor of Sofia, owned private businesses which are not disclosed and admitted in public. Usually the business is officially owned in documents by a close figure, for example, a relative of the politician.

The general public is not aware of the existence of these businesses since they are kept out of media attention. Again informal social networks grant access to this information. In this way my host represented the political and economic reality in the country as a clear overlap between the political and economical elites. In this representation, these postsocialist elites operated in the shadow periphery of society, had undisclosed and unacknowledged business enterprises and very often were tacitly located on the verge of the legally permissible economic and political norms.

In addition my host told me that K planned to launch his business in Sofia. He knew that acquiring certain political influence would make it easy for him to do this. Therefore, he invested his hopes and resources in his son's pre-election campaign. But even more importantly, he negotiated the political candidacy of his son with one of the minor competing parties in the elections – *Novoto Vreme*. In other words, it was suspected that K made a deal with the leader of the Party. The Party leader was asked to include his son in the Party list of the MP-candidates in exchange for certain favours – money donations, free advertising, etc. The pre-election meeting of the Party was set in the restaurant of Peter Tochev as described above. Apart from trying to influence the villagers, K had placed billboards containing a large photograph of his son on the main crossroads in the district capital of Assenovgrad. There were similar promotional billboards along the highway connecting Plovdiv to Sofia and in many central exit parts of Plovdiv as well. Before the event in the village K had put numerous posters of his son around the restaurant, in the centre of the village.

It is worth emphasizing how the political candidacy of the son was represented in front of the village residents and how it was portrayed intimately by my informant. The difference between official public appearance and the informal private version makes the distinction between the public and the private spheres. The private channels through which I came to know the story are indicative of the type of social trust and social networks established among the members of the village community. In this particular case, this was the interpersonal and very friendly relationship between my host, the policeman, and K, the father of the MP candidate.

Unfortunately for K and his son, *Novoto Vreme* was not able to pass the threshold barrier of 4% in order to send representatives in the parliament. This was one unsuccessful attempt at starting a political career relying on private family connections. But it shows how people who have already established themselves as prosperous businessmen make use of the current political system to attain political influence in order to secure the further expansion of their

businesses. They become clients of the political parties in exchange for certain favours, usually money donations in supporting the Party campaign. Politicians also look for support from big businesses and thus make themselves obliged afterwards. The case described here has led to the conclusion that the interrelation and interdependence between the politics and business in Bulgaria rests on reciprocation of favours. Political networking and Party affiliation are important factors in the strategy of connecting to the state centre of authority and power. Through building and managing social networks, K located his family very close to obtaining political representation and having privileged access to various resources granted by the potential parliamentary membership. His unsuccessful attempt proved however the weakness of his social bonds and the inadequacy of his social partners. I may only speculate whether during the next elections he will again try to promote his son's political candidacy. It might be the case that this time K will use his resources to affiliate with another political formation or he might prove his loyalty to *Novoto Vreme* and once again sponsor their campaign in exchange for his son inclusion in the Party's lists.

In the socialist period K also used kinship ties to accumulate his initial business capital, my host Iliya claimed. When he was young, he worked in Libya as a technician. This activity was usually closely observed and controlled by the state and the Party figures. The brother of K was a prominent Party functionary. Hence K engaged in private jobs and earned money aside from his official employment in Libya. In doing so, he relied on his brother to provide the political cover for his extra sources of capital. As a result he accumulated considerable initial capital which allowed him to start a business after 1989. No doubt his brother's prominent position as a Party member was a meaningful resource to him – he provided the "political umbrella" and official protection from the vigilant eye of the state. Indeed the political capital in the family was transformed into economic assets. After the changes K initiated his large scale business with the capital he gained during his work in Libya. At present he again wanted to transform economic capital into political capital. He supported a newly founded Party (most probably desperate to attract economic support) in return for his son's candidacy.

It was this kinship-determined privilege to political representation that would allow the son of the businessman to run for a MP-candidate in the election. His privileged position was a result of his family affiliation. This case study demonstrates that some people who had been well-related in the past (during socialism) now managed to transform their social capital into economic and probably political resources. There is implicit continuity across time and political systems: hence families who had access to a privileged position or privileged treatment before had succeeded in positioning themselves very well after the changes. They

opened big businesses and so reaped the benefits of their past privileges in the new context of the market-oriented economic system. The privileged political and economic status was being reproduced and transferred within the framework of kinship and familial relations. K used the privileged position of his brother to gain access to capital. The economic enterprise he now owned placed him at a privileged economic position with respect to the rest. Using his privileged economic status he supported his son's political aspirations.

Antonia Pedroso de Lima (2000) describes the processes of elite reproduction among the economically powerful old familial enterprises in Portugal. Her research on large Portuguese family firms shows how kinship relations are maintained through common economic interest. The family firm is the symbol of the family – the source of their economic wealth and social prestige. Her research also demonstrates how social capital derived from belonging to a privileged circle of elite families could be transformed into economic and political capital. One of elite basic strategies to preserve their positions is by excluding outsiders and reproducing their privileges with every generation. Privileged access to training and other resources is what distinguished the members of the elite groups from the rest. As the case with K showed the Party membership of his brother was a family resource he managed to utilize for his own economic advancement. Presently he resorted to political networking as a strategy for protecting his privileged status vis-à-vis other competitors.

The Bulgarian researcher Julian Genov (2004) wrote about the notable characteristics of the contemporary Bulgarian entrepreneurs and common attitudes associated with them. He claims Bulgarians find it hard to believe that somebody could succeed without political protection (Ibid: 382). In their eyes, such a businessman would look defenceless as the majority would take hold of his/her business and possessions. For that reason entrepreneurs would prefer that others would think they have a "strong back" – a person in the government or in the parliament. Given this social context, the political ambitions of the son could be perceived as a public relations campaign. Perhaps the father wanted to create a distinctive public image of his business as affiliated with political representation in the parliament and national politics. In doing so he would secure his public position and make sure that people get the right message about his solid connections to the state politics and its institutions. In this process he had made a good use of social networks (Boissevain 1974; Ledeneva 1998; Eisenstradt and Roniger 1999).[133]

[133] The power of social connections and networks during socialism was brilliantly exposed by Georgi Markov (1990: 72-75) – a famous Bulgarian writer and dissident. He witnessed and described various developments in the first decades of the communist regime – 1950s, 1960s and 1970s. Markov had originally graduated from a Technical

The priority given to personal relations over any other credentials during socialism has been to a large extent preserved in the contemporary Bulgarian society even though the new postsocialist reality opened opportunities for professional and social advancement regardless of family connections. Some can benefit from this new arrangement but others could not escape the constraints of familial bondage, especially in small communities like Cherven. For that reason people are still inclined to attribute the success of others to external factors:

> "It is very hard for a Bulgarian to admit that someone else is cleverer or more capable. An individual with external locus of control attributes his failures to factors beyond him. Such individual even explains his own success with luck and external circumstances, and thus could not credit others with their achievements. The usual explanation for another person's economic success is related to money laundering, luck and/or appropriate "connections" that place this person in a privileged position. That is why no one dares to boast about his success, even in the case it was achieved with enterprising spirit and hard work" (Genov 2004: 382, my translation).

Therefore the case with K and his son could also be interpreted in line with these ideas. In the story suitable political connections were credited for the successful business of K. According to this representation his prosperity was a product of beneficial external circumstances (his brother's political protections) while his personal talents were seemingly downplayed. Such an interpretation suggests how individual rights and skills were undervalued as factors contributing to prosperity and means of inclusion. Prevalent were the circumstances beyond the person. In this context, a person's success depended on how skilfully he manipulated his environment to suit his objectives and achieve his goals, referring once again to Boissevain (1974: 27). There is still another evidence of such manipulation - during socialism access to political career was officially determined on the basis of one's relation to history or Party

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University with engineering qualification. Later in life, still during socialism, he became a dramatist, writing plays commissioned but sometimes censored by authorities. In 1969 Markov wrote 'I was him' – a sardonic play based on a true story he witnessed during the early years of his career as a factory engineer. One of Markov's colleagues, also a young engineer working in the factory, was the central character of the play. This young man was almost unnoticed by others until the day the Minister of Light Industry came to pay an official visit to the factory. Then she came up to the young man and mistook him for one of her nephews. The dumbfounded engineer could not dispute her wrong impression. Later he tried to explain to his colleagues about the mistake but nobody believed him either. Consequently his mediocre position at the factory changed as he became a very respected and influential person. As his close family relationship with the minister was never put into question, he was asked for numerous favours by his colleagues and often served as an intermediary between the factory and all kinds of authorities – including local police office or the ministry of industry, depending on the occasion. Wherever he went, whomever he called - his forged relationship with the minister opened doors for him. Hence this young engineer was empowered with nearly "mystical" capabilities to resolve almost any problem.

ideology (Kaneff 2004), although factors such as family and social networks also played a great role.

What was the villagers' reaction to contemporary political figures involved in national politics? Villagers had often expressed their concerns about the morality of the politicians; in their view politicians who once got access to power, started taking care of their personal business agenda. There were accusations against prominent political figures of corruption, private interests and negligence to the needs of society. Instead of looking after the state and public interests, politicians were portrayed as totally corrupt and arrogant. Furthermore the contempt for the politicians transferred into general mistrust of state institutions and nourished the disbelief in the capability of the state to handle social responsibilities. Sampson (1994) described this emerging new opposition between "us" and "them". He pointed out that the social category signified by "them" is usually "accused of deriving their wealth by cynically using their connections, corruption and ruthlessness" (Ibid: 11). I could only speculate whether the resentment towards the new entrepreneurs in Cherven was indicative of this type of opposition ("us" vs. "them").

Genov (2004) acknowledged how socially unacceptable were the extreme manifestations of wealth and prosperity within the former communist society. This is no longer the case since now economic influence and capital could be used as a means of promoting a political career, even if not always being the sure way of getting into the tracks of state politics. My case demonstrates how villagers were being influenced by dominant and economically powerful elites who tried to gain political legitimisation for advancing their business interests with no commitment to community. Hence the vote being sought after was not effective but only instrumental for providing political legitimisation for the postsocialist elites. Steven Sampson (2002) makes a similar observation in his analysis of postsocialist elites. He identifies four types of elites and among them the cluster of *"domestic business leaders"*. They are characterised as dependant on local patronage. Sampson also admits that *"some of these domestic business people become candidates for "law and order" political parties"* (Ibid: 300).

Obviously similar processes of political inclusion/exclusion take place all across former communist societies. In *Making Capitalism without Capitalists* (1998), the problems of elite reproduction in postsocialist societies are discussed in reference to the three types of capital, identified by Bourdieu (1984) – social, economic and cultural. In this sense the societies in central and Eastern Europe are historically compared and assessed in terms of the relative

priorities given to the different types of capital in different social and ideological contexts. Thus, the authors claim that the socialist society eliminated the significance of the economic capital but prioritised social (political) capital in the form of Party Membership or close affiliation with the communist Party members. In contrast, during postsocialism, the type of capital most significant for individuals is cultural capital in the form of educational credentials, technical knowledge and know-how. As a result, one of the main conclusions of this research was that persons who were able to transform their political and social capital into cultural capital became the winners of the transition. In the analysis, the terminology of *"capitalism without capitalists"* is invented to describe the current development of the postsocialist societies. *"Post-communist managerialism"* is the other term which *"describes the agents who have led the process of modernization and capitalist transformation – technocrats and managers – and it also describes the basis of their power and authority - managerial know-how and executive position"* (Ibid:54).[134]

Speculating on the question why the communist regime in his country fell so easy, the Czech sociologist Ivo Mozny (2003: 177 - 178) asserts that the "new class" of socialist elites had sought ways to convert their social capital into economic capital.[135] To realize this goal and ensure the power transfer to their descendents, these elites needed to reform the socialist system by introducing elements of the free market economy – restoring private property, creating proper institutional framework, etc. Such conversion of capital took place in Bulgaria as well (Bundjulov 2008: 201 – 267), rearranging elitist structures and networks according to the new open market ideology. There is much evidence to suggest that the agents of the economic, political and social transformation in Bulgaria have been the old socialist managers and technocrats or the so called *nomenclature* (I. Evtimov 2005: 99 – 104; I. Chalykov: 2008: 269 – 364; I. Znepolski: 2008: 275 – 282).

During socialism elites were identified as workers and peasants while the postsocialist elites' main identification is with businessmen and property owners. Dobrinka Kostova (2000) makes an analysis of the Bulgarian postsocialist elites based on interviews with top state officials and executive managers in 1990, 1994, and 1998. This long-term project enabled her to trace the changes in elite composition and factors that determined these changes. She examines variables such as age and gender, family settings, education, Party affiliation and

[134] In relation to these theories I could point to the school project presented in Chapter 5: at the core of this project was granting access to IT training. I discussed the importance of education (mainly computer training and English language) as a valuable form of cultural capital in the new global economy. However the possession of cultural capital is related to individual personalities and people's potential for social integration. This interpretation accentuates individual development rather than group membership (e.g. such as party membership).
[135] Ivo Mozny understands 'capital' in the meaning proposed by P. Bourdieu (1977).

political networks. Kostova's conclusions about postsocialist elites can be discussed in the context of my ethnographic example. One of her findings is that the new elite members come from more privileged family backgrounds in the postsocialist years in comparison with socialist elites, composed of peasants or workers and their offspring (Kostova 2000: 202-203). I also consider family background as indicative of the recent social transformations: the elites based on families of workers and peasants were ideologically replaced or reproduced as elites based on families of property holders and entrepreneurs. Similarly in the village I could observe this ideological reconfiguration taking place within one powerful family in Cherven – *Tochevi.* This rural based family had many representatives in the local communist leadership before and still other members had been politically active in pre-socialist times. In the context of the open market economy, a family member Peter Tochev has become a famous village entrepreneur thus reinforcing the family position of prominence and leadership even during postsocialism. Similar was the case with the father of the MP candidate. His brother was part of the Party elite and hence provided the necessary political protection for the informal economic activities of K in Libya. The accumulated economic capital from his informal earnings helped K initiate his private business after the changes. Thus he managed to transform the political connections of his brother (political capital) into economic assets; hence capital conversion took place in the framework of one single family. Consequently K was in a position to promote the political career of his son through political networking, albeit this time unsuccessfully.

In the conclusion, Kostova admits that "the old and new elites merged". This situaiton I could attribute not only to the recruitment of new elites during postsocialism but also to a distinctive continuity in privileges and status. Clearly the working class (determined by familial background) had greater privileges and opportunities during socialism. In contrast, now capital and property are regarded as central in determining political influence. However, as my research suggests often people in key positions during socialist times have been able to transfer their assets and continue having influence and power in the present. Therefore, kinship ties and possession of capital in combinaiton could grant access to privileges and status in the political sphere. In my analysis, political capital is transferred into economic (private wealth). Afterwards the possessors of the economic capital would like to transform it again into social political capital.

After the Elections

The Election Day (25th of June) in Cherven went on without any disturbances. Villagers, dressed up for the occasion, went to cast their votes in the Chitalishte. Their official dress code conveyed the importance of the occasion. An election committee in the village (as elsewhere in the country) was appointed to supervise the voting process. It consisted of seven members as each of them represented one of the leading political parties.[136] The composition of the committee was diverse – three of the members were residents of the village and the rest came from the neighbouring town of Assenovgrad. The chair of the committee was a retired woman from the village, representing the Bulgarian Socialist Party. Among the members of the committee was also the elder son of the restaurant owner – Martin who was acting on behalf of the King's Party.

The policeman of the village (my host) was on duty during the day, observing the village centre. The election activity in Cherven was registered at 61% or 340 villagers cast their votes. Immediately after the elections I came to know the election results, including the number of votes and their distribution in relation to political parties.[137] The Socialist Party received 161 votes or 47% of total vote. "The National Movement Simeon II" was the second political formation with 86 votes or 25%. "Novoto Vreme" attracted 28 voters, while the two splinter democratic parties had 31 in total. "Ataka" attracted the votes of 21 villagers. The Movement for Rights and Freedoms scored only 2 voters or 1% of total vote.

This distribution of votes portrayed the Socialist Party as the big winner in the village. Indeed the socialists had won a great support during the parliamentary elections of June 25 all over the country and surprisingly in big cities, including the capital city - Sofia. (The Socialist Party had expanded its electorate and attracted not only the votes of the rural population). (Political commentators described the Party's hardcore adherents as more disciplined in their support for the socialist candidates in comparison to the urban UDF-oriented voters). As a result, the political leader of the Party, Sergey Stanishev, became Bulgaria's next prime-minister, replacing Simeon II. The ruling King's Party got replaced by a new coalition government comprising members of the Movement for Rights and Freedoms, the Bulgarian Socialist Party and a few surviving ministers from the King's Party.[138]

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[136] The members of the election committee are called "zastapnici" meaning defenders – people who supervise the election procedure and make sure that each of the competing candidates is equally treated.

[137] For a complete list of the election results in Cherven, see Appendix 7.

[138] In an attempt to analyze the voters' patterns of behaviour during elections, two leading social commentators A. Rajchev and K. Stojchev (2004) offer their interpretation of the parliamentary election results in Bulgaria over the

A plausible justification of the pro-socialist attitudes in rural areas surfaced during a staged press-conference on the night of the elections. At that time the future prime-minister Sergey Stanishev (then still the leader of the Socialist Party) commented on the triumph of his Party. He declared that the state should assume its social responsibilities and not become a cover for private business interests. "A lack of statehood" was the phrase he used, trying to explain the current crisis in our society. "Only a strong state authority could handle the critical situation" was the main point of his message. This statement resonated so well with the rural population accustomed to accommodate to the policies of the omnipresent socialist state. During my first interview with the Mayor in Cherven, he also lamented the loss of state control and regulation over social matters. Similar was the opinion of my host, the policeman, who was criticizing the on-going crisis and lack of authority in Bulgaria[139].

Conclusion

The main concern in the chapter was – political and social inclusion/exclusion through kinship and social networks. I noted the continuity between the socialist and the postsocialist kinship-based elites in Cherven. How did they transform/retain their status in the community? The answer is partly contained in the fact that the rural population has been supportive of the former socialist/communist elites as part of the traditional support granted to the Socialist Party. It is due to this community-based support that the former elites retained their prestige and status in the villages during postsocialism. Being heavily associated with the Communist Party *Tochevi* enjoyed high reputation and influence at present. The representatives of this family have managed to reproduce their distinctive status and complete capital conversion in the framework of the new market-oriented ideology. On the other hand, the individual entrepreneurs and main opponents, Mitko and Diana, could not legitimize their claims to political prominence as they lacked the social and familial basis of power which *Tochevi* had in Cherven. Hence reliance on community support granted through social and kinship networks was essential to the success of *Tochevi* in perpetuating their social status. Therefore I could interpret their case as an example of inclusion driven by the principle of group

last 15 years. They notice a permanent repetitive pattern characteristic of voters' attitudes: at every postsocialist election voters rejected and replaced the ruling governments. This general pattern is graphically illustrated and possibly explained by the authors through the identification of a specific political mythology of the transition (Raichev and Stoychev 2004: 88 -114). Among the several dominant political myths they identified was the myth of the "strong state" related to the "iron hand" of the ruler. As they observed, many Bulgarians overestimate the "strong state" as capable of improving the social conditions and undervalue the potential of the civil society (Ibid: 98). As previously pointed out in the thesis in relation to the chitalishte, both the underdeveloped civil society and the legacy of totalitarian dependence help explain the general attitudes noted by the two sociologists. Their broad observations illustrate how local opinions and attitudes are shaped and not isolated from mainstream social processes.

[139] On the collapse of the socialist state and it postsocialist significance see Kaneff (2004: 176-177)

membership (French definition of social inclusion). In this regard *Tochevi* were politically and socially included while Mitko and Diana – excluded as outsiders (non-members).

In this line it is worth citing Znepolski (2008: 165, my translation) about the guiding principles of the communist regime and in doing so to observe how they have been translated into the new social and political reality in Bulgaria:

> "The dominant agrarian culture (also endorsed by the fact that almost all communist leaders have solid rural connections) blends the principle of proletarian solidarity with the affinity to the closed community and family clan relations. This culture is hostile to the liberal individualism, the idea of the active, autonomous individual. The individual is thought of as belonging to the community, which is the only authorized speaker of his yearnings, rights and duties. Clan-family structure has become the grounding principle of grouping in the building of the "new society" on both sides of the barrier – the forming Party oligarchy and the ordinary people. The Communist Party itself has turned into a referent model, since it progressively assumed the characteristics of the most powerful clan the majority of people wished to join. The misapprehension and hostility towards the other, towards the different becomes a principle of Party behaviour."

This passage tells much about the role of the individual in the communist society – individual needs and preferences were totally dependent and subordinated to collective community goals. Sanders (1949) implied that the pre-conditions for such political organization had already been present in the pre-socialist Bulgarian society oriented towards familism and collective action. Due to the prevailing "culture of familism" (noted by Sanders) or in other words "agrarian culture" (described by Znepolski) the Bulgarian society remained capsulated and unreceptive to the Western modernity giving priority to the individual and the realization of his/her talents and abilities. At the same time the processes of social exclusion and inclusion during socialism were defined on the basis of members/non-members of the family, the Party or the community emphasizing group membership as central in inclusion.

The dichotomy *individual* vs. *community* runs through the chapter and it is very notable in the story derived from the parliamentary elections from June 2005. Then the son of a powerful local businessman desired access to state politics, exclusively relying on his father's connections (family and social networks). In this case group membership (in the meaning of

belonging to a powerful family) was accentuated in the process of getting political representation (inclusion). At the same time the qualities and personal properties of that individual were understated and downplayed. The capital conversion noted in this case could also be seen as a flexible way of integration (inclusion) into the reformed postsocialist system.

Hence family networks continued to play a role in promoting individual advancement in politics. As the case taken from the parliamentary elections demonstrated, the new postsocialist elites could make use of their family backgrounds in an attempt to achieve new advantages in a manner of protecting their gains against new rivals and threats. Moreover these processes started back in the socialist period, according to Ivo Mozny (2003: 48). In his analysis the family is constructed as an epitome of the private interest counterbalancing the official ideology of collective practices and discourses. Therefore the family as a social unit becomes the agent of social change by advancing the private interests of its members at the expense of state collective structures. As a result, according to Mozny, the ruling families in the former Czechoslovakia had managed to colonize the state to the extent of transforming the system to suit their private goals and purposes.

Hence in the postsocialist society the social, political or economic integration of each individual still heavily depended on his/her success to manipulate social and family networks (his/her environment, achieved and ascribed status) and to direct capital conversion within these networks. Naturally individuals who belonged to well established and functioning networks (e. g. *Tochevi*) could benefit much more in comparison to individuals who lacked such networks that might facilitate their social inclusion (e.g. Mitko and Diana).

There is still one point to be examined in a future research on this topic – how is the public reputation and image (symbolic capital) of the family related to inclusion/exclusion? Although I do not explicitly deal with this problem in the chapter, I need to acknowledge its relevance as a factor contributing to processes of social inclusion/exclusion. In this case I relate symbolic capital to the dominant ideology of communism. Active participation in the anti-fascist resistance movement, for instance, could be regarded as a form of valuable symbolic capital after the end of World War II. This type of symbolic capital could then be converted into political and social capital. These conversions in early socialism were best described by Georgi Markov (1990: 59). Markov demonstrated how in the first years after September 9, 1944 the Communists who could provide enough evidence (in some cases their personal narratives were purely fictitious) for their active participation in the resistance movement had greater access to political power and representation. (This was the case with *Tochevi* in Cherven.) Consequently they and

their families enjoyed numerous privileges as part of the ruling communist nomenclature in Bulgaria (during socialism there was a distinctive status category in the Bulgarian official political vocabulary - "активен борец против фашизма и капитализма" translated as "active fighter against fascism and capitalism"). Undoubtedly personal biographies were many times re-written to reflect the dominant virtues of the communist regime and ideology at the time. Ultimately history (both national and personal) was utilized as a political resource in legitimating one's claims to power – a theme well developed by Kaneff (2004) under the suitable heading *Who owns the past?*

On the other hand, individuals and their families who were once discredited by the communist regime (e.g. labeled as bourgeois traitors or enemies to the state) could now gain political and economic legitimacy (owing to the restitution of property rights and restoration of nationalized real estate and land). In some cases, members of such families have gained political influence exploiting their newly acquired "dissident" status in the same manner in which it was previously done by the communists claiming participation in the anti-fascist resistance movement. During socialism, however, the discredited families and their members lacked extensive social and political networks as a result of their inferior position vis-à-vis communist ideology. In this sense they were socially and politically discriminated (excluded) with respect to mainstream society. In Cherven I came upon one such informant who claimed to have been subjected to discrimination due to his belonging to a wealthy family that had been ideologically rejected and devalued by the communist power brokers in the village. Such cases expose the negative side of the family connections as in certain situations these could be detrimental to one's social integration. However these negative cases could only reaffirm the crucial importance of family and social networks in promoting the social advancement of individuals in the Bulgarian society. Therefore depending on current political context and ideology, kinship networks could prevent or facilitate participation in the life of the community, and thus become a powerful instrument of political and social exclusion and inclusion.

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Chapter 8

CONLCUSION: INCLUSION AND EXCLUSION DURING POSTSOCIALIST TRANSFORMATIONS

In the thesis I look at the processes of inclusion and exclusion in a Bulgarian village called Cherven. My impressions of the villagers and their lifestyles were shaped by daily interactions and regular visits to their households. Indeed the rural household was the unit of my observation and I collected data on family and kinship relations, property and land ownership, farming practices, reciprocity and exchange taking place within social and kinship networks. At the same time I relied on key informants for gathering information related to important community projects and institutions – the cooperative, the local school, and the culture house (chitalishte). My research experience in Cherven was beneficial and contributed to representing the community as a multidimensional and dynamic social environment in which meanings, practices and discourses were constantly developed and reinvented.

'Social Exclusion' after Socialism

In the beginning I have intended to study how rural households cope with problems generated by the sudden and unexpected impoverishment of the Bulgarian population after the end of socialism. The local practices and responses to social exclusion and poverty I observed were by no means new. The reliance on social and kinship networks strengthened and intensified to allow for accessing all available resources within those networks. Kinship based urban-rural networks to a great extent compensated for inadequate state support in many spheres, most notably in the sphere of social security provision. By correcting deficiencies in the economic and political system, the kinship networks made possible the social integration of villagers.

Therefore, the main theme of the thesis, inclusion and exclusion, is reviewed in reference to the theory of *social capital* (Bourdieu 1980, 1986) and *network approach* in investigating social reality (Boissevain 1974). By connecting these theories and approaches I try to advance the understanding of inclusion/exclusion phenomena in the Bulgarian society after the fall of the communist regime. I regard my research as a contribution to the studies done on postsocialist societies and the relevant social and

ideological changes taking place in these societies.[140] At the same time my theoretical emphasis makes my research compatible with other studies done on 'societies in transition', for which the network approach proved to be very revealing (Giordano 2003).[141]

I differentiate between two approaches to inclusion/exclusion – the French and the Anglo-Saxon (Borodkin 2000).[142] These two approaches correspond to two different social and political doctrines – traditional conservatism and classical liberalism (Byrne 2005). This correspondence is a major point in my analysis since it determines the basic dichotomy upon which the research is centred - the dichotomy of community (collective/ community related ideologies like communism) vs. individual (ideologies centred on the individual and the individual rights like neoliberalism). In Chapter 2 (the theoretical foundation of the research) I discussed how these two approaches (the French and the Anglo-Saxon) could be ultimately related to the two perspectives on social capital, depending on how the profits or returns are accumulated – individually or collectively.

In Bulgaria the ideology of communism was rooted in the dominant *culture of familism* (Sanders 1949: 144-160) most recently described as *agrarian culture* (Znepolski 2008: 165). During state socialism the social rights were presumed to be collective (group) rights accentuating community solidarity in opposition to individual rights which were mostly associated with the main ideological opponent – the bourgeois state (ibid: 89). Regarding social provision and integration, the communist emphasis was on supporting the basic living standard of all citizens.[143] The loyalty to the state and its ideology was ensured through allowing access to education and other benefits such as free healthcare, guaranteed employment and adequate social security system. Elements of the agrarian culture were introduced into the state ideology and practice during socialism. People were terribly divided and opposed to each other as members and non-members with respect to the ruling Party – an opposition characterizing all communist societies. Therefore, inclusion/exclusion during socialism was determined on the basis of group membership – or the social and kinship networks a person belonged to or is excluded

[140] I have made references to these works in the introduction to the research, Chapter 1.
[141] For a complete discussion on the application of the network approach in anthropological research, see Chapter 2.
[142] See Chapter 2.
[143] See Chapter 1.

from (the French approach). As the individual rights were publicly negated, most aspects of individuality (e.g. diversified consumer tastes and consumption, individual lifestyles, sexual orientation, etc.) were downplayed and even persecuted (Markov 1990).[144]

The political and economic changes after the collapse of the communist regime proved crucial for the overwhelming majority of Bulgarians. Many of them, not belonging to the state power hierarchies, could not completely recover from their "loss of statuses". As noted in the Introduction to the thesis (Chapter 1), the state withdrawal was experienced at many levels of society as a general decline in living standards. The processes of social differentiation in the contemporary Bulgarian society have been adequately scrutinized by Bulgarian social researchers (Rajchev & Stojchev 2004; Znepolski 2008). In their representations the Bulgarian transition is viewed as a process of gradual loss of social rights (privileges) once granted by the socialist state in exchange for loyalty. This decline was framed as "loss of statuses" and therefore the "transition" was characterised with a constant struggle to maintain the socialist statuses once taken for granted (Rajchev & Stojchev 2004: 65-69). Among the notable statuses guaranteed during socialism were the right to full employment, free and open access to education and healthcare, social benefits for mothers and children. As a result social policy was a political instrument intended to guarantee a basic subsistence minimum of the population and contribute to the social homogenisation of all Bulgarians (Znepolski 2008). Since the socialist political system is no longer in place, the collective social rights and benefits, once being all-accessible and inclusive, dwindled and the processes of marginalization and exclusion were underway.

As a consequence of decreasing living standards and missing safety nets vulnerable social groups appeared within the Bulgarian society. Following the ideological shift, the official attitude towards the problems of poverty and exclusion changed accordingly. Important aspects of social security policies were redefined in correspondence to the new social realities. The postsocialist approaches to social inclusion prioritised the social protection of the defined risk groups: unemployed people, children, low-income households, and people with disabilities, mentally sick people, and ethnic minorities.

[144] It is important to note that the Party elites and their close associates were allowed more personal freedom. Differentiated treatment eventually created 'cracks' in the system and exposed its ideological inconsistency.

Nevertheless, in many cases, the state provided social security was seen as inadequate in relation to the needs of its recipients. One basic drawback of the state policies was the accepted definition of need based on income (Chapter 6). Many times this official definition did not contribute to the wellbeing of the recipients of such aid and left many people outside the range of social assistance.

Therefore, the fall of the communist state signified the end of mass privileges and mass support. After 1989 the introduced doctrine of neoliberalism put a quite different emphasis on social relations. The priority previously given to community and its development has been replaced with an ideology centred on the individual and personal advancement in a competitive environment. In this new situation, the understanding of the problems of poverty and social exclusion was advanced and resulted in government programs and initiatives for facilitating the social and economic inclusion of the marginalized and risk groups mentioned above. At the same time the government policies connected to EU funding aimed to support individual projects of farmers, businessmen, etc.

The collapse of the socialist state structures had a negative effect on people's perception and experience of security and wellbeing. My informants in Cherven evaluated their present living conditions in negative terms – growing living expenses, market-related uncertainty (in the case of local small scale farmers), unemployment (affecting young villagers), and poor healthcare, expensive medications (affecting pensioners). In the last decades economic reforms necessitated cuts in social security programs and payments. As a result of this stringent policy many villagers experienced a real decline in standards and social security provisions. In this situation I could observe how they were trying to make use of other means of social assistance, mainly resorting to family and kinship networks.

Kinship and Social Networks as Instruments of Inclusion/Exclusion

I look at various applications of kinship networks in all but one chapter of the thesis: in Chapter 5 I do not explicitly deal with family or kinship networks, since this chapter focuses on institutional transformations. In every other chapter I discuss problems related to kinship and family: in Chapter 3 the reliance on the family and kinship group

is analysed in relation to the farming practices of the household; in Chapter 4 family relations are considered in connection to the growing tourist economy in the village; in Chapter 6 I interpret the importance of kinship and family networks for the provision of social security; at last in Chapter 7 I try to relate local political developments to national processes by looking at how kinship based elites transformed and retained their social power and influence.

In all these spheres (farming, social security, local politics, and family business) I find the accessibility and functionality of such networks as crucial for the individual and familial advancement and integration (inclusion). The weight of social and kinship networks in Cherven is felt well beyond the boundaries of individual families. This impact is reflected in the ways the village economy is transformed (Chapters 3 and 4) and integrated into the framework of the EU economy. The influence of family and kinship is also notable in dealing with social insecurity in the community (Chapter 6) and in the sphere of local political representation and leadership (Chapter 7).

In Chapter 1 I argued that kinship and social networks and related forms of capital are powerful instruments of inclusion/exclusion. (I regard kinship networks as *the core* around which other types of networks are formed). In Chapter 2 I accepted that social networks are characterized in terms of two types of actions (*communication* and *instrumental*) and qualities of relationships (*reciprocity*, *durability*, and *intensity*) (Mitchell 1969).[145] I suggested that these attributes of social networks could be applied to the study of kinship networks in the village. Using Mitchell's terminology then I expected that in a rural society, kinship and family ties would be characterised with high levels of reciprocity, durability and intensity. Consequently these attributes of kinship relationships determined the cases of inclusion and exclusion I came upon in the village. Basically I observed that well functioning and easily accessible kinship networks contributed to the wellbeing and social security (aspects of social inclusion) of the individuals and the families belonging to such networks. On the contrary, people who had fragmented and dislocated kinship networks could not mobilize support in life crisis situations (a situation indicative of social exclusion). I clearly demonstrate this point by reviewing two opposite examples of how kinship was experienced in Cherven in

[145] *Reciprocity* refers to transactions and exchanges taking place within a relationship, *durability* characterises the lasting quality of the relationship (long- or short-term) and *intensity* reflects upon the strength of obligations inherent in the relationship.

Chapter 6. Functionality and accessibility of kinship networks I could easily relate to the attributes described above. My observations led me to conclude that "social exclusion" is more likely to be experienced by families or single individuals in case of fragmented/dysfunctional networks within which the reciprocal exchange of favours is interrupted, the duration of the relationships is uncertain and the strength of moral obligations (implied by kinship) is undermined. In Chapter 6 I also explore attitudes to work and try to connect these to social security and family relations. Overall "working hard" was highly esteemed by my informants as it was seen as the exclusive way of achieving prosperity for all family members. At the same time social security was a collective achievement since all members of the family and kinship group contributed (offering labour and other material resources) to the resolution of social security problems within their network.

In critical situations accumulation of social capital (in the meaning of belonging to social networks through which resource exchanges took place) was vital for the survival of individuals and their families. The adaptability and inclusion of people depended on their abilities to successfully convert their social and cultural capital accumulated during socialism into present day advantages. Thus postsocialist changes induced a shift away from the community and promoted individualizing practices and discourses – mostly notable in the case of the developing industry of rural tourism in Cherven (Chapter 4). Owing to government support and EU pre-accession funding rural tourism has developed into a promising industry and source of livelihood for many villagers in Bulgaria. The development of rural tourism was one economic alternative to devaluated farming in rural areas. In Cherven I had the chance to observe three families engaged in the developing tourist infrastructure of the Rhodope region. These families had established their hotels and restaurants around the period of my fieldwork (2004/2005). The social context in which they operated was by and large hostile towards private enterprise and entrepreneurship owing to the legacies from socialism. Individualizing practices and discourses set these families apart from the mainstream village population. In this chapter I tackle the problem of social polarisation through interpreting the interviews taken from the three wives of the local entrepreneurs. Each one of them was to a great extent active in the family business and their comments on the social status of their families proved very useful in analysing the emerging social distinctions in Cherven. In a way, the three entrepreneurial families exposed the negative side of

social and kinship networks as instrumental in enforcing social inequalities and becoming a powerful tool of exclusion in the postsocialist societies.

The confrontation and business competition among these families was real and could not be easily transformed into cooperation. The family business was carried out in a cultural context defined as *'low trust'* and this definition could explain why the three families distrusted one another and could not cooperate (Chapter 2). The relationship of trust-distrust marked the distinction between private and public spaces.[146] Generally speaking, this distinction implies that in private people can interact with complete trust in one another while the public space is outside of one's social/family trusted relations. Sanders (1949) observed the same enduring attitude: trusted family relations became the solid base of business enterprises before socialism.[147]

For me as a researcher the hotel owners also represented a shift away from the communist ideology of the collectives - their families have epitomized the private interest and individual action, more in line with the Anglo-Saxon approach to social inclusion through advancing the individual rights. The centrality of the individual impact on community development is an issue of great relevance for the village economy nowadays. All three families had cultural capital in their possession that was revalued after the changes. Using their labour, initiative and insight they had managed to reshape the village community and turn Cherven into a local leisure centre.

[146] The dichotomy private vs. public is discussed by K. Roth (2007) who points to a typical Bulgarian culture-specific feature: Bulgarians in general care much more about their private spaces (for instance, invest time and resources in maintaining their homes clean and orderly and expanding family/kinship networks) but they remain indifferent to any civic involvement outside the family - this trait is being associated with negligence to public spaces (e.g. throwing rubbish on the street).

[147] "Commerce, as represented by about ten merchant groups, had become established in the village because it was conducted essentially as a family enterprise. From time to time a local man sold some of his land and started in business for himself. He always employed members of his family rather than outsiders, because he trusted his own. If he needed extra help and had an unmarried son, the normal thing was to urge matrimony. He carried over into his business the same idea of division of labor which prevailed at home and in the field. The man ordered goods, settled the accounts, sold the liquor in the taverns. The women acted as cooks or clerks. Some of the wives who helped keep the store could not read, write, add, or subtract and had to give whole measurements or else depend upon the customer to hand them the right amount for fractions. A husband explained when I discussed the matter with him, 'It is better to lose money through error than through dishonesty.' Both men and women co-operated in keeping the place clean. Here the man made a concession which he would seldom have made in the home" (Sanders 1949: 147).

The sociologist Ivo Mozny (2003) suggested that the collapse of the communist regime in Czechoslovakia was orchestrated from within the 'new class' of managers and technocrats in the so called communist nomenclature. These ruling families, according to Mozny, desired to transfer their social capital into tangible and secure economic assets (economic capital) and for that reason they needed to reform the socialist system in accordance to their private interests. To make this possible the postsocialist reforms introduced elements of the free market economy – private property and enterprise, adequate institutional framework, etc. The idea of capital conversion within social networks, put forward by Mozny (2003), was also developed by a team of Bulgarian researches (Deyanov 2008; Tchalykov 2008) in a collection of papers titled *Mrezhite na prehoda…Kakvo vsyshtnost se sluchi v Bylgaria sled 1989 g.? (2008).* (*The networks of transition… What has actually happened in Bulgaria after 1989?)*

Thus, the collapse of the state socialism in Bulgaria had resulted in a new reconfiguration of networks and resources distributed within these networks. Under the new conditions some families had managed to preserve and transform their capital as was the case with *Tochevi* in Cherven (Chapter 7). *Tochevi* had a substantial symbolic capital owing to their active participation in the anti-fascist resistance movement. Later with the advancement of the communist power they could convert their symbolic capital into political and social capital. Representatives of this prominent extended family had been active communist leaders in the community – a position that remained essentially unchallenged to this very day. In Chapter 7 I speculate how these family members managed to preserve their distinctive status in the community owing to the pro-socialist support in rural areas noted by other researchers as well (Creed 1999; Kaneff 2004). In the long run the Bulgarian Socialist Party has managed to legitimise its presence in the contemporary political landscape. Its success solidified the positions of families that had been in the past affiliated with its predecessor - the Communist Party.

Therefore I demonstrate how in many occasions belonging to a social and/or kinship network could influence individual chances for social, political and economic inclusion (Chapters 4, 6 and 7). In this regard, as recognized in Chapter 4, belonging to an enterprising family in the village is a way of promoting economic and social inclusion of all family members through the criterion of group membership (the French approach). The same argument is also relevant for the cases presented in Chapters 6

and 7, where I consider how membership in informal networks is decisive for social security provisions (social inclusion), and political participation (political and social inclusion). At the same time, as mentioned above, these closed informal networks had the negative effect of reinforcing social distinctions between the families and individuals. The negative implication of networks, actually their weight in the processes of social exclusion is most notable in Chapter 4 where I discuss problems of social differentiation. Therefore villagers who were well positioned and made extensive use of their networks could be regarded as socially included relative to those whose social and kinship networks had collapsed or not existed at all.

Social Capital (Informal and Formal) and Community Transformation

Informal social capital in networks (social and kinship) could become quite influential in transforming local economic practices and discourses and ultimately altering the economic and social profile of the community. Hence the enterprising families described in Chapter 4 all contributed to turning the village into a local leisure centre. Consequently Cherven was transformed from a farming community into an integral part of the EU economy. In this line I have to acknowledge the external influence of government sponsored projects for encouraging rural tourism and promoting regional development. The recent establishment of rural tourism in the village illustrates how informal social capital could function to address current problems of local development in compliance with public rules and government strategies in a postsocialist context: "This is an environment in constant change where, as in any other social context, change is introduced from "above" and mediated from "below" to be adapted to the range of everyday strategies and choices'' (Torsello & Pappova 2003: 31). This quote reveals the interplay of structure and agency in the process of social inclusion taking place in the Bulgarian countryside: local actors adapt their life strategies to fit into the national framework for economic and social development. On the other hand, the case of rural tourism in Cherven exemplifies how social integration is possible when government policies address local needs and correspond to individual and family projects of economic development.

Not everyone is equally engaged in the market economy though, and for that reason rural tourism is an option available to few. A considerable majority of the villagers in

Cherven remains excluded from and could not participate in the current developments. The new hotels and restaurants provide employment to a limited number of people from the village. Nevertheless, I could speculate that the influx of outside visitors and tourists would have a revitalizing effect for all aspects of the local economy, including farming. Then there might be positive side effects for the residents of Cherven who are not directly occupied in tourism. Only a further research into these topics can demonstrate the exact dimensions of the rural tourism in the community.

It is clear that social and kinship networks exemplify the informal social capital. In addition I apply the notion of formal social capital when I review cases of institutional and community transformation: local institutions such as the farming cooperative, the school and the chitalishte I regard as forms of public good available in the community (Chapters 3 and 5). In other words these organizations exemplify the institutional aspect of social networks (Chapter 2).

The end of state centralization policies affected not only industry and agriculture. It had also influenced nation-wide reforms in mass culture and education - a topic I discuss under the theme of '*community transformations*' in Chapter 5. I look at the local chitalishte and school as forms of formal social capital and I try to establish a relationship between their past and present functions and meanings. The analysis of these community centres reflects on the changes taking place on two interrelated levels – ideological and cultural/educational. Even though the school and chitalishte in Cherven were pre-socialist organizations, during socialism both were used as means of promoting state socialist propaganda. The cultural and education activities conformed to the official ideology: these activities were all-inclusive and accessible and hence contributed to the establishment of the image of the egalitarian community.

Traditionally the school and the chitalishte in Cherven (and this is relevant for all rural areas) had a positive impact on rural integration that could not be disputed. Their enlightened mission as cultural and educational institutions had greatly accelerated the cultural, social, and economic inclusion of rural residents (especially those coming from economically backward areas of the country). In 2005 the school was involved in a government sponsored project to introduce IT training. The initiative to enforce the implementation of IT technologies belonged to the school Principal. In similarity to the

development of rural tourism, again I acknowledge the leading role of the individual engagement of the Principal - crucial in promoting changes and transformations in the community.

The end of state centralization introduced new changes in the status and functions of the local school and chitalishte. Hence I refer to processes that have not only local but national significance. The chitalishte had been legally defined as a civil society organization in 1996. Notably this new definition of status (the change from state institution to NGO) had opened space for private initiative and action. Nevertheless the chitalishte continued to be supported by the state although it was not the only exclusive source of endorsement.

The general underdevelopment of civil society in Bulgaria had a negative impact on the functioning of the chitalishte as a local community centre. In Cherven the problem was aggravated by the fact that many young villagers with higher education had left the village in search for better jobs and careers. Depopulation and out-migration were two major factors that hindered social and cultural development in rural areas. The case with the neglected chitalishte in Cherven was speaking blatantly of these two negative tendencies: of all activities only the library had somehow managed to survive. Depopulation and lack of prospective students was the main reason behind closing down the local school in 2008.

If we think of the chitalishte and school as representing accessible social capital through establishing "networks of civic engagement" and social norms (Putnam 1994, 1995), then the recent marginalization and extinction of these institutions in the rural areas of Bulgaria would signal a process of gradual decline of formal social capital available in the community. In this respect I observed how informal social capital (in the meaning of personalised networks) had replaced formal forms (centralized institutions) in scope and relative significance.

Final Remarks

My research in Cherven demonstrated that the social integration is possible and successful only when national policies of development are well connected to local

(family and individual) strategies and projects. I have tried to identify the agents of change and describe how their activities shape the processes of inclusion and exclusion through examining their kinship and social networks. In these processes skills and qualifications (cultural capital) as well as networks (social and political capital) from socialism are continually re-valued. I show how formal social capital (institutions) in the village is declining in relative importance to informal social capital (personalized social and kinship networks). The local institutions in Cherven (e.g. the local cooperative, the school and the chitalishte) are no longer central to community development in the way they had been in the past. Under centralized state control their functions were closely related to the ideology of the collectives; mass participation was encouraged through various programs and events sponsored by the state. Today, the new ideological emphasis on neoliberalism promotes individual projects and initiatives in an attempt to decentralize the economy of the country. The role of the active individual assumes a new significance and becomes indispensable to community inclusion into the global economy.

In this conclusion I would like to establish some historical connections and thus demonstrate how the present developments in Cherven were not disconnected but chiefly related to traditional attitudes towards kinship and its significance for the processes of inclusion/exclusion. In the past the extended family organization *zadruga* satisfied the basic social security needs of its members (Chapter 3). The partiarchical family framed the obligations and roles of family members within the kinship group: children were subordinated to their parents (age-related subordination) and women were subordinated to man in the family (gender-related subordination). Through reproduction of traditional roles and obligations (reproduction of statuses) across generations, social security for all members of the kinship group was achieved. Generally basic needs were dictated by tradition – as seen in the example of building and expanding a family house. Consequently kinship networks provided the resources (care) for satisfaction of these needs.

Therefore tradition and its perpetuation were of great significance because in this way collective security was achieved and maintained within the kinship group. Individual practices and discourses were discouraged since they undermined familial connections of interdependence on which the collective security rested (Sander1949: 181):

> "There individual maladjustment was at a minimum, for each conforming individual had the backing of all other guardians of tradition. In our western society the material prizes are much greater but the risks are greater too. Truly, the individual stands alone against the world, the captain of his soul, capable of reaching heights of achievement of which no peasant would ever dream, but likely to grow disappointed in his failure to accomplish more. Widespread personal insecurity is the price we pay for the possibility of advancement. In Dragalevtsy of 1937 the peasants would gladly do without very rapid advancement or progress for the security inherent in their devotion to and perpetuation of the past."

In this passage, individualism is explicitly associated with risk and insecurity. On the contrary, tradition and its perpetuation were linked to security and the peasant worldview. As indicated in Chapter 6, not only individualism but also the separation of family members might provoke insecurity, alienation and disruption of the reciprocal obligations between siblings. In the passage Irwin Sanders did not reflect on the problems of social exclusion and inclusion in particular. Nevertheless his description, I think, is still valid in the sense discussed above. In addition he relates individualism to progress and advancement while tradition is associated with resistance to change, compliance and obedience. The inherent conflict underlining this opposition is the conflict between collectivism (e.g. zadruga & state paternalism) and individualism. This opposition is reflected in the dichotomy of security (tradition) vs. risk (progress and advancement).

How are these oppositions relevant to the main theme of the thesis – inclusion/exclusion? I suggest that the choices people are forced to make in their everyday struggle with insecurity reflect their basic orientation in life as being individualistic or part of the collective. I conclude that group membership as a way of integration (following *the French approach to the social exclusion*) is still valid in interactions and interrelations among people in the Bulgarian rural society – that is people look for support from their immediate family/kinship group. Thus they still rely on family and kinship networks for accessing valuable resources in many spheres: economic, political, related to social security, etc. Therefore I have tried to uncover and

describe the mechanisms through which villagers make use of their kinship group or social circles to attain resources and satisfy their social and economic security needs. In this process I considered the role of the state and its relevant policies of regional economic and social development.

There is, however, a new tendency countering collectivist attitudes – the neoliberal emphasis on the individual rights, development and achievement associated with *the Anglo-Saxon approach to the social exclusion.* In the analysis of exclusion/inclusion in the contemporary Bulgarian village (Cherven) I demonstrate how individualistic practices and discourses have greatly confronted and challenged traditional views on community solidarity and participation, notable during socialism and even before it. Therefore in the future we could still witness the confrontation of these two distinctive worldviews and strategies of adjustment. Based on my observations, I could assert that the chances of integration and inclusion depend on people finding the right balance between risk and security, progress and tradition, individual interest and community development.

Main Points in Summary

In the thesis I refer to two approaches towards defining the complex concept of social exclusion (the French approach and the Anglo-Saxon approach) in order to take into account the different strategies of social integration – community-centred vs. individual-centred. The analyses stress the role of kinship and family based networks (as one subdivision of social capital commonly attainable in the village) and their productive or redistributive functions in overcoming social exclusion. At the same time aspects of social inclusion regarded as both a group and individual phenomenon are discussed in relation to local economic diversification, culture and education, social security provision and political representation. As a result identified are the marginalized villagers (in political, social, economic and cultural sense) in contrast to the successful and socially integrated counterparts. The explanation of the failure or success in respect to social integration is provided in the light of the theories of social capital (networks) and the potential of the respective agents to transform it into political, cultural or economic capital. I argue that social inclusion is now attainable (without or with minimal state support) as an individual or family strategy of social adjustment.

Therefore social inclusion today to a great extent depends upon the re-valued skills, and the resourcefulness of agents acting as individuals, or as members of their family or kinship group (a mix of the French and the Anglo-Saxon approaches to social exclusion). In this process capital conversions within social and kinship networks take place. The extent to which people become "included" depends on how successful they are in managing their social capital and all related forms of capital. It is possible that kinship networks remain the only form of social capital available to marginal groups to ease the insecurity and compensate for the lack of significant cultural or economic capital. Under socialism the emphasis was on building community institutions under centralized state control. Ultimately community advancement was accentuated through institutional development – e.g. cooperative, school, chitalishte. Today decentralization policies reinforce the significance of personalized social networks – informal social capital. As the old community institutions lag in modernization or are closed down, the informal social networks compensate for the systemic distrust.

After state socialism the majority of Bulgarians have experienced the end of *mass privileges* (i.e. the end of state sponsored living standard enjoyed by the average socialist citizen), and the end of social inclusion determined on the basis of *group or community membership* (and with respect to economy – preferential treatment of economic sectors e.g. *agriculture*; with respect to social security provisions – social benefits and social aid distributed to *mothers, children* or government spending to encourage the social inclusion of *minority populations*;). Thus the fall of communism induced a sense of great insecurity among rural people and dissatisfaction with the state ("the state is no longer able to provide the necessary protection; therefore the state appears to be weak and even nonexistent"). In view of the collectivist dispositions inherited from socialism, the priority given to the individual achievement (individual rights) today is not easily assimilated by some people who are used to relying on the state to meet their basic necessities (perpetuating their homogenised statuses). In this situation their feelings and experiences of being socially excluded (deprived of the safety net of the state) are deepened and result in nostalgic remembrances of the socialist protectionism.

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Appendix 1

The Laeken Indicators[148]

In economic studies and social policy research, poverty analyses are used in specifying certain aspects of social exclusion. In Bulgaria, poverty analyses are based on data from the regular Household Budget Survey conducted by the National Statistical Institute. In the years 1995, 1996 and 1997 the nationwide representative sample of the survey included 6000 urban and rural households. The sample was reduced to incorporate half as much – 3000 households since August 1st, 2002. Since 1999 household expenditures were structured in accordance to the international classification of consumer expenditures approved by EUROSTAT (The European Statistical Office): The Classification of the individual consumption by purposes.

Since the beginning of 1990s in EU social exclusion was linked to poverty and monitored by the Laeken indicators measuring the various types of household incomes. The National Statistical Institute started measuring the Laeken indicators from 2001 onwards using the same Household Budget Survey (HBS). The methodology for calculating the Laeken indicators is as close as possible to the methodology used by the member states of EU. Achieved is the maximum comparability of results with the European Community Household Pane (ECHP) which is the basic source of comparative data on incomes and living conditions in the European Union.

The Laeken indicators are calculated on the basis of two definitions of income – monetary income and monetary income plus income in kind (subsistence production and other non-monetary forms of income). EUROSTAT published these indicators for Bulgaria on the basis of the second definition – monetary income plus income in kind while for other member states the first definition based on monetary income alone is used. Other non-monetary Laeken indicators are calculated on the basis of Labour Force Survey and the Demographic Statistics. Some of the Laeken indicators for monetary poverty measured in Bulgaria are the following: polarization coefficient, Gini coefficient, poverty threshold, poverty level by age and sex, poverty level according to most frequently practiced occupation, poverty level by household type, poverty level by property status, etc.

[148] Source: Съвместен меморандум по социално включване ‘Република България’ (2005) в сайта на Министерство на труда и социалната политика (Joint memorandum on social inclusion ‘Republic of Bulgaria’ (2005) on the website of the Ministry of Labour and Social Policy: http://www.mlsp.government.bg/bg/docs/index.htm, p. 51, pp. 62-63

Appendix 2: Maps[149]

1. Map of Bulgaria showing the regional division.

2. Map of the Assenovgrad Municipality showing the belonging villages, including Cherven.

[149] Source: The website of the Assenovgrad Municipality: http://www.assenovgrad.com

Appendix 3

Tables (1-5) with Statistical Data on the Population in Cherven (Census 2001) [150]

Table 1

1. Distribution of the population in Cherven by age, sex and economic activity

	Total	By economic activity		
		Employed	Unemployed	Not active
Total	**802**	**206**	**82**	**514**
under 15 y.o.	102			102
15 - 19 y.o.	26	3	3	20
20 - 29 y.o.	77	34	28	15
30 - 39 y.o.	94	67	22	5
40 - 49 y.o.	66	45	14	7
50 - 59 y.o.	119	56	14	49
60 - 69 y.o.	130	1	1	128
70 - 79 y.o.	150			150
80 y.o. and over	38			38
Men	**393**	**112**	**60**	**221**
under 15	53			53
15 - 19 y.o.	12	2	3	7
20 - 29 y.o.	38	18	20	
30 - 39 y.o.	51	36	14	1
40 - 49 y.o.	34	21	11	2
50 - 59 y.o.	62	34	11	17
60 - 69 y.o.	72	1	1	70
70 - 79 y.o.	53			53
80 y.o. and over	18			18
Women	**409**	**94**	**22**	**293**
under 15	49			49
15 - 19 y.o.	14	1		13
20 - 29 y.o.	39	16	8	15
30 - 39 y.o.	43	31	8	4
40 - 49 y.o.	32	24	3	5
50 - 59 y.o.	57	22	3	32
60 - 69 y.o.	58			58
70 - 79 y.o.	97			97
80 y.o. and over	20			20

[150] Source: www.nsi.bg

Table 2

2. Distribution of the population in Cherven by sex and marital status

	Marital status		
	Total	**Men**	**Women**
Total	**802**	**393**	**409**
under 15 y.o.	102	53	49
15 - 19 y.o.	26	12	14
20 - 29 y.o.	77	38	39
30 - 39 y.o.	94	51	43
40 - 49 y.o.	66	34	32
50 - 54 y.o.	59	31	28
55 - 59 y.o.	60	31	29
60 y.o. and over	318	143	175
Single	**209**	**125**	**84**
under 15 y.o.	102	53	49
15 - 19 y.o.	25	12	13
20 - 29 y.o.	36	25	11
30 - 39 y.o.	17	11	6
40 - 49 y.o.	10	7	3
50 - 54 y.o.	8	8	
55 - 59 y.o.	4	3	1
60 y.o. and over	7	6	1
Married	**443**	**224**	**219**
under 15 y.o.			
15 - 19 y.o.	1		1
20 - 29 y.o.	39	13	26
30 - 39 y.o.	71	38	33
40 - 49 y.o.	49	22	27
50 - 54 y.o.	42	19	23
55 - 59 y.o.	50	25	25
60 y.o. and over	191	107	84
Divorced	**17**	**11**	**6**
under 15 y.o.			
15 - 19 y.o.			
20 - 29 y.o.	2		2
30 - 39 y.o.	5	1	4
40 - 49 y.o.	4	4	
50 - 54 y.o.	3	3	
55 - 59 y.o.	1	1	
60 y.o. and over	2	2	
Widowed	**133**	**33**	**100**
under 15 y.o.			
15 - 19 y.o.			
20 - 29 y.o.			
30 - 39 y.o.	1	1	
40 - 49 y.o.	3	1	2
50 - 54 y.o.	6	1	5
55 - 59 y.o.	5	2	3
60 y.o. and over	118	28	90

Table 3

3. Distribution of the population in Cherven by sex and economic activity

	Number of employed by economic activities		
	Total	**Men**	**Women**
Total number of employed	**206**	**112**	**94**
Agriculture, forestry and reserve	46	33	13
Fish industry	1	1	
Mining industry	1	1	
Processing industry	83	32	51
Supplying electricity, heating, fuels and water	1	1	
Construction	4	4	
Commerce and repairs of cars, personal items, household appliances	6	4	2
Hotels and restaurants	12	6	6
Transport, warehouse, communications	3	2	1
Operations with real estate, renting, business services	7	5	2
State governace and defence; compulsory social security	18	15	3
Education	11	2	9
Health care and social services	7	3	4
Other services to community and people	6	3	3

Table 4

4. Distribution of the population in Cherven by sex and ethnicity

	Total	0 - 4 y.o.	5 - 9 y.o.	10 - 14 y.o.	15 - 19 y.o.	20 - 24 y.o.	25 - 29 y.o.	30 - 34 y.o.	35 - 39 y.o.
Total	**802**	**29**	**41**	**32**	**26**	**27**	**50**	**54**	**40**
Bulgarian	795	29	41	32	26	26	49	52	39
Turkish	6					1	1	2	1
Other	1								
Men	**393**	**19**	**20**	**14**	**12**	**14**	**24**	**28**	**23**
Bulgarian	389	19	20	14	12	13	23	26	23
Turkish	4					1	1	2	
Women	**409**	**10**	**21**	**18**	**14**	**13**	**26**	**26**	**17**
Bulgarian	406	10	21	18	14	13	26	26	16
Turkish	2								1
Other	1								

	Total	40 - 44 y.o.	45 - 49 y.o.	50 - 54 y.o.	55 - 59 y.o.	60 - 64 y.o.	65 - 69 y.o.
Total	**802**	**24**	**42**	**59**	**60**	**54**	**76**
Bulgarian	795	24	41	59	60	54	75
Turkish	6		1				
Other	1						1
Men	**393**	**15**	**19**	**31**	**31**	**32**	**40**
Bulgarian	389	15	19	31	31	32	40
Turkish	4						
Women	**409**	**9**	**23**	**28**	**29**	**22**	**36**
Bulgarian	406	9	22	28	29	22	35
Turkish	2		1				
Other	1						1

	Total	70 - 74 y.o.	75 - 79 y.o.	80 - 84 y.o.	85 - 89 y.o.	90 - 94 y.o.
Total	**802**	**75**	**75**	**28**	**9**	**1**
Bulgarian	795	75	75	28	9	1
Turkish	6					
Other	1					
Men	**393**	**29**	**24**	**14**	**3**	**1**
Bulgarian	389	29	24	14	3	1
Turkish	4					
Women	**409**	**46**	**51**	**14**	**6**	
Bulgarian	406	46	51	14	6	
Turkish	2					
Other	1					

Table 5

5. Distribution of the population in Cherven by age and education

	Total	University degree	Specialization	High school
Total	**802**	**10**	**21**	**229**
Under 7 y.o.	42			
7 - 14 y.o.	60			
15 - 19 y.o.	26			4
20 - 29 y.o.	77	5	3	43
30 - 39 y.o.	94	2	4	73
40 - 49 y.o.	66	1	1	34
50 - 59 y.o.	119		3	44
60 - 69 y.o.	130	2	6	21
70 - 79 y.o.	150		4	9
80 y.o. and over	38			1

	Total	Primary school	Basic and drop-outs	Illiterate	Children
Total	**802**	**313**	**183**	**2**	**44**
Under 7 y.o.	42				42
7 - 14 y.o.	60	1	57		2
15 - 19 y.o.	26	21	1		
20 - 29 y.o.	77	25	1		
30 - 39 y.o.	94	15			
40 - 49 y.o.	66	29	1		
50 - 59 y.o.	119	69	3		
60 - 69 y.o.	130	78	22	1	
70 - 79 y.o.	150	62	74	1	
80 y.o. and over	38	13	24		

Appendix 4

Household Budget Survey[151]

Household Budget Survey is a nationwide survey conducted by the National Statistical Institute in Bulgaria. The survey collects data on household expenditure and income – both monetary income and income in kind. At present the survey annually observes a nationwide sample of 3000 randomly selected households. For methodological considerations all types of households are represented in this sample – one-member, two-member, etc. In addition represented are rural and urban households, low- and high- income households, and households of minority groups. Some types of households are difficult to access. Usually these are the households of the exceptionally poor or their opposite – the extremely wealthy.

The participation in the survey is voluntary. So if a household selected in the sample refuses to cooperate, an equivalent replacement is made - the substitute household should resemble the original choice as closely as possible (the basic characteristics of the two households should match to ensure that the sample is representative for the whole of the population in the country). The households which participate in the survey are observed for one full year. One of the household members takes on the responsibility to fill in a diary recording the household budget – incomes and expenditures. The diaries are collected every fifteen days (twice a month) when a representative of the survey visits the household and monitors the proper recording in the diary. Very often the representative cross-checks the data recorded in the diary, and often gives instructions how to properly write down the recordings. The data on household incomes, expenditures and consumption collected by the survey are applied for evaluating the official poverty line, and other living standard indicators. These indicators are helpful for designing government policies with respect to social integration. For that reason experts from the Bulgarian Ministry of Labour and Social Policy work in close cooperation with experts from the National Statistical Institute responsible for HBS.

[151] Current information about the Household Budget Survey is available on the official website of the National Statistical Institute, Bulgaria: http://www.nsi.bg/BudgetHome_e/BudgetHome_e.htm

Appendix 5

Questionnaire on Rural Households

Households

What is a household in the perceptions of Bulgarians and Poles? Who lives in the house? How many people live in your house? How are they related to each other? How many adults and how many children? Who are the permanent members of the household and who are coming from time to time?

Property

Who owns the house? Did you build your house on your own? Did you inherit it? How did you move in the house? What does land mean to you and your family? Do you own arable land? How much land do you own? Do rent a land from someone or do lend a land to someone? (To whom or from whom? Why?) What kind? For how long the land has been in possession of your family? Did you own the land in the past? Is it the land a main source of your income? What do you produce? Do you produce for your family (relatives in the cities, neighbours, etc.)? Do you sell the surplus of your produce to the market? Is the income from your land enough to support your family? Did you ever think about selling the land? Is there anyone who will inherit the land after you? Do you work your land on your own? Who is involved in the agricultural work – family, friends, seasonal workers, etc.?

Living Conditions

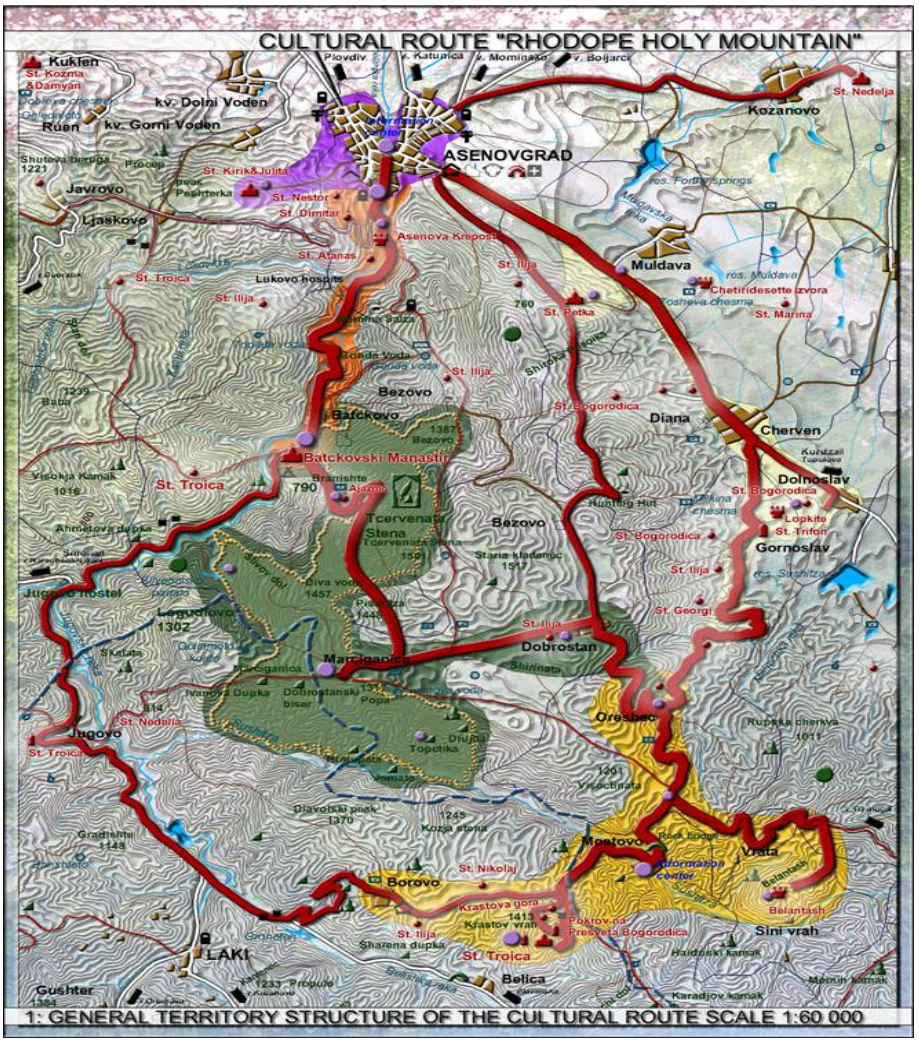
What are your sources of income in addition to subsistence or/and market-oriented farming? Do all members of the household contribute to the family budget? Who is in charge of the family budget? How much do you spend on food, housing, (electricity, and house equipment, clothes, education and culture, pleasures, newspapers)? Do you occupy the entire house; does every one have his/her own room in the house? Feeding habits – how many meals per day do you have, how often do you eat meat?

Family Life

How big is your family? Is it one generation or two generations? Do you have children? Are they all living in the house? Do they have their own houses? Did they move to the city? What are they doing? Do you support your children? Do children support you? What is the division of work in the family? Do you involve your children with farm work or do you involve other people, under what conditions?

Appendix 6

Map of the Cultural Route "Rhodope Holy Mountain"[152]



Appendix 7

[152] Source: Ministry of Regional Development and Public Works: http://www.mrrb.government.bg.

An Excerpt from the Protocol of the Election Section Commission in Election Section No. 170100096 (Cherven) for the Parliamentary Elections on June 25, 2005[153]

1.	**Number of voters in the basic election list:**	**580**
2.	**Number of voters in the additional election list:**	**7**
3.	**Number of voters according to the signatures in the election lists:**	**353**
4.	**Total (turnout)**	**60%**
5.	**Number of votes found inside the election boxes:**	**353**
6.	**Number of invalid votes:**	**13**
7.	**Number of valid votes:**	**340**

Distribution of Votes by Candidate Lists

Coalitions and Parties	**Number of Votes Received**	**% of total**
Coalition for Bulgaria: • **Bulgarian Socialist Party** • **Party of Bulgarian Social Democrats** • **Political Movement Social Democrats** • **Bulgarian Agrarian People's Union Alexander Stambolijski** • **Civil Union "Roma"** • **Movement for Social Humanism** • **Green Party of Bulgaria** • **Communist Party of Bulgaria**	**161**	**47%**
National Movement Simeon II	**86**	**25%**
"Novoto Vreme" (The New Time)	**28**	**8%**
United Democratic Forces: • **Union of Democratic Forces** • **Democratic Party** • **Bulgarian Agrarian People's Union-United** • **George's Day Movement** • **Movement for and Equal Public Model**	**23**	**7%**
National Union "Attack": • **National Movement for the Salvation of the Fatherland** • **Bulgarian National Patriotic Party** • **Union of Patriotic Forces and Militaries of the Reserve Defence**	**21**	**6%**
Democrats for a Strong Bulgaria	**8**	**2%**

[153] Source: Central Election Commission, Bulgaria

Movement "Bulgaria Go Forward"	**2**	**1%**
National Coalition "Long Live Bulgaria"	**2**	**1%**
"Coalition of the Rose"	**2**	**1%**
Movement for Rights and Freedoms	**2**	**1%**
Federation of Free Business – Union Bulgaria	**1**	**0%**
"Granit"	**1**	**0%**
"Chambers of Experts"	**1**	**0%**
Bulgarian People's Union: • **Bulgarian Agrarian People's Union-People's Union** • **Internal Macedonian Revolutionary Organization - Bulgarian National Movement** • **Union of Free Democrats**	**1**	**0%**
Party of Free Democrats	**1**	**0%**
Coalition "Dignified Bulgaria"	**0**	**0%**
Evroroma	**0**	**0%**
FAGO	**0**	**0%**
United Party of the Pensioners in Bulgaria	**0**	**0%**
Bulgarian Christian Coalition	**0**	**0%**
"Nikola Petkov"	**0**	**0%**
"Roden Kraj"	**0**	**0%**
Total:	**340**	**100%**