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Communist Social Policy

Pension Policy in Bulgaria

ABSTRACT The introduction of a universal, egalitarian social security system was promoted by the USSR in all countries within its sphere of influence during the communist period. However, despite this rather uniform external pressure, communist countries followed different social policy routes in terms of timing and design. Bulgaria was one of the first Eastern European countries to introduce a uniform pension system within a short period of time. In this article, we argue that besides communist ideology and pressure from the USSR, pre-communist social policy legacies, national constellation of influential actors, and country-specific socioeconomic conditions during the communist era are crucial when explaining the concrete design and timing of pension reforms in communist states. Using the method of process tracing and based on archival and document research, we shed light on the two most important pension reforms targeting the rural population in communist Bulgaria. We show that the political and ideological developments in the Soviet Union in the 1960s and 1970s in combination with the demographic and economic problems of Bulgarian agriculture can explain the early establishment of a unified pension insurance system in Bulgaria.

KEYWORDS pension policy, Eastern European social policy, social protection in Bulgaria, communist welfare states, pension provision for farmers

The spread of communism after World War II led to profound socioeconomic transformations in all countries across Eastern Europe. Communist regimes created a new social order based on the principle of social equality proclaiming social security as a fundamental right of the citizens. In line with the communist ideology, the USSR pushed all countries within its sphere of influence toward a universal egalitarian social security system (see Szikra and Tomka 2009, 22–23; Orenstein 2008, 81–83; Cook 2007, 31–41). However, despite this rather uniform external pressure, communist countries followed different social policy routes in terms of timing and design. But why was that the case?

In general, knowledge about communist social policy in Eastern European countries is scarce in comparative welfare state research in comparison to numerous studies that have focused on Western countries. Even though Eastern European social policy has been addressed in recent decades, studies almost exclusively focus on the period



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after the collapse of the communist bloc (Cerami and Vanhuysse 2009; Careja and Emmenegger 2009).

This article examines state pension provision for the rural population, an area in which the Eastern European countries differed considerably under communism. We focus on Bulgaria, a case that is particularly suitable for the study of pension protection for farmers, as it was one of the communist states with the most egalitarian approach to social security for this group within the Eastern Bloc. Bulgaria was the first communist country in the Eastern Bloc to adopt a comprehensive pension system for cooperative farmers and unified pension provision for farmers and workers. We explain why Bulgaria established an egalitarian pension insurance system within a short period of time by looking at the two most important pension reforms after the communists took power in a military coup in 1944 until the collapse of the Eastern Bloc. Specifically, these are the introduction of pension insurance for cooperative farmers in 1956 and the establishment of a unified pension insurance system that covered all major occupational groups in society including workers and farmers in 1975.

We argue that the pressure by the USSR alone cannot explain the concrete design and timing of social security reforms. How the Soviet pressure and the communist ideology influenced social policies depends greatly on the national actor constellation, which is shaped by pre-communist factors. In Bulgaria about 80% of the working population in the 1940s were small farmers (Daskalov 2005, 249), for whom pension insurance was introduced prior to the communist takeover and whose role was crucial in the development of pension policy under communist rule (Haggard and Kaufman 2008, 165). Based on archival and document research, we show which actors were crucial for the two major reforms in the realm of pension policies mentioned above and demonstrate how they influenced the priorities and motives of the ruling communist elite for old-age policy reforms over time.

This article contributes to the comparative welfare state literature by focusing on a period hitherto mostly neglected, that is, social policy in an Eastern European country *during* communist times. Moreover, it provides the first in-depth analysis of state social protection for the rural population in communist Eastern Europe. The article shows that social policies in the communist era were not only shaped by the communist ideology pushed by the USSR, but also rather strongly determined by pre-communist legacies in welfare provision, country-specific socioeconomic conditions, and national constellation of influential actors. It also adds to the literature dealing with the effects of authoritarian regime where communist regimes are often treated as a homogeneous group that is assumed to implement egalitarian social policies using welfare policies as a means of creating legitimacy and ensuring regime survival (Kailitz 2013). From this perspective, however, the wide variance within this subtype of authoritarian regimes is obscured (see Deacon 1992 for a typology). Moreover, we provide one step to a more comprehensive knowledge on the history of welfare states in the Eastern Bloc during communist times which is necessary to understand welfare state trajectories and social problems of contemporary Eastern European states.

This article is organized as follows. In the next section, we briefly summarize the state of the art. Subsequently, we discuss the historical background of pension reforms for farmers in Eastern Europe in general and particularly in Bulgaria before addressing methodological issues. In the next section, we focus on the explanation of pension reforms in both 1956 and 1975 by combining external and domestic explanatory factors. A final section concludes.

STATE OF THE ART

When explaining the formation of the welfare state, comparative welfare state research focusing on Western countries has emphasized domestic factors such as industrialization and urbanization to shape the development of social and pension policy. The increase in productivity induced by industrialization provided governments with fiscal resources, which allowed them to respond to growing social needs. Economic modernization and its impact on the social structure and demographics are assumed to play a key role in the emergence of the welfare state (e.g., Wilensky 1974). This development has been fostered by strong labor unions and left-wing parties with their working-class background (e.g., Esping-Andersen 1990). More recent studies have argued that globalization (e.g., Schmitt and Starke 2011), policy diffusion, and regime competition (Obinger and Schmitt 2011), international organizations such as the ILO and the World Bank (Deacon 2007; Orenstein 2008), and war (e.g., Obinger, Petersen, and Starke 2018) have a significant impact on social policy-making.

However, most studies explaining the emergence and development of social policy within comparative welfare state research primarily focus on Western welfare states. In the last decades after the breakdown of the communist bloc, more and more studies analyze social policy reforms in post-communist Eastern European countries. The communist period is often addressed only when elucidating the historical background and the legacy of social policies in post-communist countries (e.g., Cerami and Vanhuyse 2009; Cook 2007; Haggard and Kaufman 2008; Sotiropoulos, Neamtu, and Stoyanova 2003; Deacon 1992; Inglot 2009; Guardiancich 2012; Vanhuyse 2006). The communist past has long been regarded by welfare state researchers as a common experience of post-communist states, suggesting that post-communist countries share a common communist legacy with similar characteristics across communist regimes. Social services in the communist period were provided by the state where markets and private forms of social provisions were eliminated. Moreover, "State-funded social services such as health and education, although comparatively of low quality, were nearly universally available" (Cook 2007, 1). Universalism was assumed to be combined with a social stratification privileging elite groups of the society such as industrial workers, members of the armed forces, the Communist Party, and state bureaucracy (Cook 2007; Coppieters, Deschouwer, and Waller 1994). In this perspective, the heterogeneity of social policies across countries is often neglected. Systematic analyses of the similarities and differences of welfare history across countries have started only recently and are mostly restricted to small-n comparisons (Cerami 2006; Ekiert and Hanson 2003; Inglot 2009;

Tomka 2004). Moreover, this literature typically focuses on prominent cases such as Poland, Czechoslovakia, and Hungary.

As communist regimes are typically characterized as autocracies, and more concretely as communist ideocracies, literature dealing with social policy-making in autocratic regimes is also relevant. These studies argue that social policy reforms are triggered by the logic of regime survival (Rimlinger 1971). Autocrats implement social policies strategically to maximize their policy preferences but also to increase the likelihood of regime survival (Bueno de Mesquita et al. 1999; 2003). In the field of pension policy, scholars found that “notably old-age pensions involve targeted distribution of resources to particular groups, and thus constitute a special form of co-optation” and that especially pension schemes in autocracies are “used for political-survival purposes” (Knutsen and Rasmussen 2018, 660). Pension policies are implemented to cater to pensioners as one of the most powerful groups of a society and to please groups of “critical supporters” whose support is needed for maintaining the political regime (Knutsen and Rasmussen 2018, 664). However, within this strand of literature, communist ideocracies are often treated as a homogeneous group (Kailitz and Stockemer 2017; Kailitz 2013).

In sum, all strands of literature provide valuable insights on relevant determinants for pension reforms. However, each strand of literature presented also has systematic limitations that need to be addressed. Comparative welfare state research sheds light on national and international factors driving social reforms. However, not only were theories primarily developed for Western democracies, but also the empirical information on social security systems available was mainly restricted to Western European states for a long time. Only in recent years have more and more scholars also considered social policy trajectories in Eastern Europe. However, these studies mainly focus on the post-communist era and address the communist period mostly as historical background for post-communist reforms.

PENSION PROTECTION FOR FARMERS IN COMMUNIST BULGARIA AND EASTERN EUROPE: HISTORICAL BACKGROUND

Previous research on communist social policy in Eastern Europe has rarely addressed the social security of the rural population. This is surprising considering that peasants were an important social force in Eastern Europe during much of the communist period, making the extension of state social protection to the countryside an essential prerequisite for the creation of a universal welfare provision. For instance, two decades after the communist takeover more than half of the population in Bulgaria and Romania, the two most rural countries in the region, was still employed in agriculture; in Czechoslovakia, the most industrialized country in Central and Eastern Europe, peasants made up about a quarter of the population (Lungu 1965, 145). During the communist era, the Eastern European states differed considerably in terms of agricultural policies, pace and methods of agricultural collectivization as well as the role of agriculture and farmers in the economy and society (see Francisco, Laird, and Laird 1980; Kaser 1986; Wädekin 1982). In Bulgaria, the collectivization of agriculture was achieved faster than in any

other Eastern European country. The rural sector played a central role in the national economy, and agriculture contributed a significant share of the country's exports, as Bulgaria developed within COMECON as an agricultural supplier to the Eastern Bloc (Marčeva 2016; Migeu 1995).

Considerable differences also existed in the area of social provision for the rural population. Collectivization of agriculture played a crucial role in the establishment of universal social security systems throughout the region (except in Poland, where collectivization failed; see Haggard and Kaufman 2008, 148–149). However, collectivization cannot be considered the sole explanatory factor for the extension of public welfare provision to the peasantry, as communist regimes differed greatly in terms of the timing and design of welfare reforms for farmers both before and after the completion of collectivization. In the pre-communist era, the rural population was generally excluded from state social insurance (Szikra and Tomka 2009, 33). One exception was Bulgaria, which, despite being one of the least economically developed countries in Europe, introduced a pension insurance system for private farmers as early as 1941.¹ This legislation was retained after the communist seizure of power, extended in generosity and coverage in 1946,² and from 1948³ also applied to cooperative farmers on slightly more favorable terms than to private farmers. Apart from Bulgaria, in the early postwar period only Czechoslovakia enacted pension legislation to benefit the peasantry by granting private farmers pension insurance for the first time in 1948 (de Deken 1994, 56–57). In contrast, private farmers in Hungary became entitled to pensions only in the 1960s and in Poland (where, due to the failure of collectivization, private farmers made up the majority of the rural population) and Romania not until the 1970s (Ingloft 2008, 184; Ekiert and Hanson 2003, 220; Wädekin 1982, 179).

From the 1950s onward, cooperative farmers throughout the Eastern Bloc were granted pension rights via the establishment of separate pension schemes that provided less favorable conditions than those for employees (ILO 1960). Bulgaria paved the way for comprehensive pension reforms for cooperative farmers by becoming the first communist state in Eastern Europe to introduce a centralized, state-subsidized pension fund providing old-age pensions to the members of agricultural cooperatives in 1956.⁴ Hungary followed suit and set up a self-sustaining pension fund for cooperative farmers in 1958 (Tomka 2004, 78; Szemzo 2012, 94). Czechoslovakia was next with the introduction of a comprehensive pension system for cooperative farmers in 1962 (replacing a rudimentary scheme from 1952/1953 that applied only to advanced cooperatives), followed by Poland in 1962/1965 (ILO 1960, 325–327; Wädekin 1982, 179). In Romania, which along with Bulgaria had the largest agricultural population in communist Eastern Europe, it was not until 1966 that peasants were granted pensions (Wädekin 1982, 179). The extension of public pension provision to farmers in communist Eastern

1. *State Gazette* No. 37 (1941).

2. *State Gazette* No. 129 (1946).

3. *State Gazette* No. 11 (1949).

4. *State Gazette* No. 1 (1957).

Europe did not follow the Soviet model, as the Soviet Union was a latecomer in granting social rights to the rural population with its first nationwide, centralized pension insurance system for collective farmers introduced in 1964 (Ivanova and Plaggenborg 2015, 107). The inclusion of the rural population in the state pension system created universalism, but not egalitarianism, as farmers' pension programs were less generous than those of workers. In Bulgaria, the second-class status of farmers was completely overcome in 1975⁵ with the creation of a unified, egalitarian pension system for workers and cooperative farmers. In Czechoslovakia, unification also took place in the mid-1970s, but only with regard to members of "advanced cooperatives" (Minkoff and Turgon 1977, 179); in Hungary, equal pension regulations for cooperative farmers and workers did not come into force until the early 1980s (Tomka 2004, 80). In contrast, in the Soviet Union and Romania, class-based inequalities in pension protection for farmers and workers were maintained (Stiller 1983; Racocanu 1998).

How can we account for the universalistic and egalitarian approach to pension policy for farmers in communist Bulgaria? Why was Bulgaria the first communist country in Eastern Europe to introduce a comprehensive pension system for cooperative farmers and one of the pioneers in equalizing the pension rights of cooperative farmers and workers? We argue that the timing and design of pension reforms for farmers in Bulgaria can be explained by a combination of external and internal factors. To understand the early integration of farmers into the public pension system, it is crucial to consider both Soviet influences and the central role of agriculture and farmers in Bulgarian economy and society.

METHODOLOGICAL ISSUES

In this study we shed light on the causes and rationales underlying the egalitarian pension policy for farmers in Bulgaria. In particular, we focus on the adoption of the two major pension reforms for cooperative farmers in Bulgaria during the communist period: the introduction of a comprehensive pension insurance system for members of agricultural cooperatives in 1956, and the unification of public pension provision for cooperative farmers and workers in 1975. For the purpose of the research objective, we use the method of process tracing as it is particularly useful for exploring the preferences, perceptions and decisions of policymakers and allows both the description of the complex process underlying the adoption of welfare reforms and the evaluation of causal claims (Levy 2008; Collier 2011). The empirical analysis is based on archival documents from the Bulgarian State Archive and the Archive of the Bulgarian Communist Party relating to the pension reforms under consideration. The preference for the utilization of archival documents is based on the consideration that they represent a useful source of information for the purpose of the study, as they allow the collection of primary data on pension legislation and the tracing of specific patterns of government action in the area of public pension provision. Moreover, the examination of archival records provides a unique opportunity to reveal the debates and backgrounds of social policy-making and to

5. *State Gazette* No. 53 (1975).

uncover the specific motivations behind the drafting and adoption of social reforms by public authorities at the highest political level.

Archival documents can make a valuable contribution to the study of the motivations underlying the implementation of welfare reforms in communist regimes, but they also have some limitations that need to be addressed. One main problem concerns the reliability of the information contained in archival documents, since in communist states official documents were published under the ideological dictates of the ruling elite and often used for political purposes and propaganda. Furthermore, it was solely the decision of the Communist Party what information was deemed worthy of recording and collecting. Relying exclusively on official documents can therefore lead to highly misleading conclusions due to source biases. In addition, due to restrictive state censorship and extensive state control over society under communism, the archive materials only allow an examination of the decision-making process from an elite-centered perspective. Since sources of information other than the documents produced and collected by state authorities are virtually nonexistent, conclusions can only be drawn regarding the aspirations and motivations of the ruling political elite for the implementation of welfare reforms, but not about potential influences from outside the ruling regime. Thus, archival documents can hardly tell the whole story.

To mitigate these limitations of primary data collection in archival research and increase the credibility and validity of the research findings, we draw on a wide range of primary and secondary sources. To reveal the hidden mechanisms and reconstruct the process of decision-making underlying the two major pension reforms under study as well as to ensure in-depth and more unbiased findings, we supplement the officially published documents with party-internal records and strictly-confidential materials of the Communist Party. To deepen contextualization and ensure validation, we supplement the primary data with historiographical secondary sources. The main archival materials that we are relying on include stenographic reports of the Bulgarian National Assembly, original legislative texts, materials, documents and minutes of plenary sessions and meetings of the Politburo of the Bulgarian Communist Party (BCP), resolutions and decisions of party congresses, and reports and minutes issued by public institutions on the elaboration and adoption of key pension reforms. The analysis is complemented by documents from the Communist Party of the Soviet Union (CPSU), revealing how political and ideological developments originating in the USSR influenced the priorities and motives of the ruling communist elite in Bulgaria for pension reforms for farmers over time. To ensure a structured and transparent overview of the primary sources used in the empirical analysis, we provide an appendix in the supplementary material.

THE CASE OF PENSION POLICY IN BULGARIA

First Reform 1956: Introduction of Pension Insurance for Cooperative Farmers

In 1956, a year considered a turning point in the history of socialism, one of the most significant social security reforms of the postwar period took place in Bulgaria. With the

adoption of the Cooperative Farmers' Pension Act,⁶ Bulgaria became the first socialist state to introduce comprehensive pension insurance for cooperative farmers. The old-age insurance came into force on January 1, 1957, and covered all men and women, who were members of the agricultural cooperatives (*TKZS, trudovo kooperativni zemedelski stopanstva*) and had reached the age of 16. Women were entitled to an old-age pension from the age of 55 and men from the age of 60. The law provided for the establishment of an independent old-age insurance scheme that applied only to TKZS members and thus cannot be considered an extension of the existing pension programs. Under the provisions of the new law, cooperative farmers were considerably privileged over private farmers, for whom a special old-age pension scheme had been introduced in 1941. Compared to the workers' pension scheme, the pension program for cooperative farmers was less generous in terms of funding and calculation of pension benefits. However, its establishment was of enormous symbolic importance, as it provided cooperative farmers with old-age protection comparable to that granted only to the working class.

How can this early integration of farmers into the state pension system be explained? Using archival documents, we first focus on international influences to show how agriculture became a priority of the political elite in Bulgaria in the mid-1950s and on the influence of the national context such as the country's economic and social structure as it had a significant impact on how external pressures were translated into national policy-making.

On the international level, there were two main external factors that made agriculture a priority for the BCP in the mid-1950s. The first factor was the economic pressure resulting from the shift in economic priorities in the socialist states after Stalin's death. The emergence of the "new course" had a significant impact on the development of socialist economies and led to the first reform efforts in the field of economic cooperation within the Council for Mutual Economic Assistance (COMECON). The IV. COMECON session in March 1954 played a central role in this process, as it marked the beginning of plan coordination within the socialist camp. Of great importance was the speech of Anastas Mikoyan, deputy prime minister of the USSR, in which he sharply criticized the "parallelism"⁷ of the planning system of the socialist economies and advocated the introduction of an "international division of labor in the socialist camp."⁸ He further stated that in the future member states would have to develop their economies according to their natural and economic resources⁹ and that agriculture should no longer be neglected.¹⁰ In line with these statements, the IV. COMECON session decided to apply the principle of coordination of national economic plans in the member countries. Consequently, the first serious attempts at economic specialization within the Eastern Bloc were made at the VII. COMECON session in Berlin in May 1956, when Bulgaria

6. *State Gazette* No. 1 (1957).

7. Centralen Džržen Arhiv (CDA; Central State Archive). F.1B, op.6, a.e.2083, 24.

8. CDA, F.1B, op.6, a.e.2083, 26.

9. CDA, F.1B, op.6, a.e.2083, 26.

10. CDA, F.1B, op.6, a.e.2083, 28.

was assigned specialization primarily in its traditional economic sectors of agriculture, light industry, and food processing.¹¹ Due to increasing international obligations, the increase of production in these sectors gained considerable importance for the communist regime in Bulgaria.

Second, and in addition to economic pressure, political pressure was also an important factor in making agriculture a priority for the communist regime in Bulgaria. In late 1955, the new Soviet leader Nikita Khrushchev laid out his plan for the development of the Bulgarian economy in a secret letter dated October 27, 1955. Considering Bulgaria's natural and economic resources, Khrushchev recommended the development of the traditional branches of agriculture and light industry. To accelerate the process of agricultural collectivization, he also offered generous support for agricultural mechanization.¹² He stated that the Bulgarian leadership had the task of completing the process of collectivization in the next two to three years and justified this demand as follows: "Successful collectivization in a country like Bulgaria would be of great political importance. It would be a good example for other countries with people's democracy. It would finally crush and bury the hopes of the reactionary circles in the West who are counting on the peasants in the countries with people's democracy not to go to the collective farms."¹³

Beyond the international pressure, due to the special internal conditions in Bulgaria, winning the loyalty of the peasants was of strategic importance for the Communist Party from the very beginning. In the late 1940s, Bulgaria was an agrarian state and had the longest history of agrarian political activism in Eastern Europe (Bell 1977). Even after the Communist Party's seizure of power, the Bulgarian Agrarian National Union (BANU) continued to have considerable influence in Bulgarian society. Thus, in 1945, the BANU with its 750,000 members was the strongest political party in the country (Šarlanov 2009, 35). These specific national conditions had a significant impact on the communist strategy toward the peasantry. First, in order not to lose its influence in the countryside, Sovietization was not declared an official goal of the communist regime in the first postwar years (Šarlanov 2009, 35). The socialization of agriculture and the prohibition of private property were not included in the political program of the Fatherland Front (1944), nor in the first socialist constitution of Bulgaria (1947).¹⁴ Second, to gain the support of the peasants for the new socialist system, the BCP found a specific solution to the problem of the socialization of agriculture. Unlike in the Soviet Union, the new form of socialized agriculture in Bulgaria was cooperative and not collective (Crampton 1987, 157). Membership in the agricultural cooperatives was voluntary, and members retained ownership of the land they contributed to the cooperatives and received rent for it (Marčeva 2016, 54). Moreover, in the late 1940s, the communists established

11. CDA F.1B, op.5, a.e.207, 4–68.

12. CDA F.1B, op.6, a.e.2723, 7.

13. CDA F.1B, op.6, a.e.2723, 8.

14. The Dimitrov Constitution was in force from 1947 to 1971 and provided only for the restriction, but not the abolition, of private property (Art. 10).

a two-party system in the country and declared the BANU their “most faithful ally in building socialism” (Znepolski 2009, 150; Marčeva 2016, 76). Finally, social security measures were also part of the communists’ strategy to secure the loyalty of the peasantry. In 1946,¹⁵ the existing old-age insurance for private farmers was significantly improved through the extension of its coverage to women and an increase in benefits.

However, the communists’ strategy of persuading farmers to voluntarily join the cooperatives did not prove successful, and despite all the measures taken, the majority of farmers opposed the collectivization of agriculture. Thus, from 1944 to 1948, only 8% of the land was socialized (Znepolski et al. 2019, 127). With the beginning of the Sovietization of Bulgaria in 1948, mass collectivization of agriculture as an integral part of the general transformation of the country along Soviet lines became inevitable and the regime increasingly responded to peasants’ resistance to join TKZS with repression. The collectivization of agriculture in Bulgaria proceeded in several stages and was accompanied by unprecedented violence and mass uprisings in the countryside (Migeu 1995; Brown 1970; Witkowski 2014, 476). Through various mechanisms, including economic and political pressure and massive repression, the communist regime forced millions of peasants into the cooperatives within a few years, so that by 1951 60.5% of the land was collectivized (Migeu 1995, 210). However, since the regime’s harsh repression had a negative impact on agricultural production (Crampton 2007, 343), forced collectivization was halted in 1951 (Migeu 1995, 119).

In December 1955, under the influence of the Soviet leader, a plenum of the BCP decided to continue the collectivization of agriculture.¹⁶ The plenum stressed that mass collectivization can be achieved only on a “voluntary basis” and therefore “the advantage of TKZS must become clear and its attractiveness must be increased.”¹⁷ The task of increasing productivity in agriculture became even more important in 1956 due to Bulgaria’s economic obligations within COMECON. Thus, in July 1956, at a plenum of the BCP, the new party leader, Todor Zhivkov, officially declared: “The task of increasing agricultural production, further strengthening the collective sector and completing the socialist transformation of agriculture in the next two to three years . . . must now be regarded as our most important economic and political task, as an extremely important part of our program for building socialism in our country.”¹⁸

In order to complete the collectivization of agriculture and increase the productivity of the cooperative sector, the BCP decided to take measures to raise the living standard of TKZS members and improve their old-age protection by introducing a special pension insurance scheme.¹⁹ Against the background of the upheavals in the socialist camp, the adoption of the law became even more urgent. One indication of this is the statement

15. *State Gazette* No. 129 (1946).

16. CDA F1B, op.5, a.c.187, 3.

17. CDA F1B, op.5, a.c.187, 39.

18. CDA F1B, op.5, a.c.212, 145.

19. CDA F1B, op.5, a.c.212, 16.

made by Peko Takov, a member of the Politburo, at a party plenum on the occasion of the unrest in the socialist camp in late October 1956, where he criticized the fact that, although the party had already announced that it would draw up the bill, little progress had been made. In the face of the uprisings in the socialist bloc, he went on to declare that “this issue must be resolved and not postponed.”²⁰ Shortly afterward, the bill was elaborated, and on November 22, 1956, the BCP approved its adoption.²¹

The introduction of old-age pensions for cooperative farmers was of great strategic importance to the communist regime and was intended to achieve both economic and political goals. This is evident from the motives presented by the government at the official adoption of the law in the Bulgarian Parliament on December 30, 1956. Thus, it was intended to promote the “struggle for highly productive agriculture”²² and to contribute to the “complete victory of socialism in the countryside.”²³ Moreover, domestically, this act intended to prove the “correctness of the communist party’s policy”²⁴ and, on the international level, “to demonstrate the superiority of socialism over capitalism.”²⁵ For the latter, the introduction of old-age insurance for cooperative farmers had great significance. When the law came into force on January 1, 1957, it created considerable privileges for TKZS members and thus provided a major incentive for private farmers to join the agricultural cooperatives. And indeed, the measures taken to strengthen the cooperative sector contributed significantly to transforming Bulgaria into a model socialist state. At the VII Congress of the BCP, held in June 1958 in the presence of Soviet leader Nikita Khrushchev, Todor Zhivkov stated that “in the People’s Republic of Bulgaria, socialism has triumphed and dominates all spheres of social, political, economic and ideological life.”²⁶ Thus, Bulgaria has officially been declared the first socialist state after the Soviet Union to achieve full collectivization.

Second Reform: Establishment of an Egalitarian Social Insurance System in 1975

In the two decades following the introduction of old-age insurance for cooperative farmers, the communist regime in Bulgaria gradually expanded the social protection rights of the rural population. This occurred first in the area of disability (1959)²⁷ and survivors’ pension (1961),²⁸ followed by the extension of cash benefits under health and accident insurance (1967)²⁹ and family benefits (1973)³⁰ to cooperative farmers.

20. CDA F.i.B., op.5, a.c.233, 87.

21. CDA F.i.B., op.6, a.c.3075, 1–4.

22. Stenographic Reports of the Bulgarian National Assembly (SRBNA) of December 30, 1956, 267.

23. SRBNA of December 30, 1956, 267.

24. SRBNA of December 30, 1956, 267.

25. SRBNA of December 30, 1956, 272.

26. Radio Bulgaria: 1958 – The VII Congress of the Communist Party declares the victory of socialism <https://bnr.bg/radiobulgaria/post/100483520/1958-sedmiat-kongres-na-bkp-obavava-pobedata-na-socializma> (accessed February 27, 2025).

27. *State Gazette* No. 64 (1959).

28. *State Gazette* No. 50 (1961).

29. *State Gazette* No. 50 (1967).

30. Since October 1, 1973, cooperative farmers have been entitled to family allowances equivalent to those of workers. In: SRBNA of July 1, 1975, 35.

On July 2, 1975,³¹ the National Assembly adopted important amendments to some pension laws, abolishing the law on old-age insurance for cooperative farmers and incorporating them into the old-age insurance system for workers. When this act came into force,³² farmers were fully integrated into the general pension system, creating a uniform, egalitarian social security system for the entire population.

We have argued that the relatively early establishment of an egalitarian pension system in Bulgaria was the result of the interaction of external and internal factors. With regard to external influences, it was the political and ideological changes in the socialist bloc in the 1960s and 1970s that influenced BCP policies and pushed the process of abolishing the differences between the two main groups of the socialist society—workers and peasants. The first key event that had a profound impact on the BCP's policy toward the peasants was the proclamation of the Third Program of CPSU at the XXII Party Congress in October 1961. This program was adopted with the ambitious goal of building communism within the next two decades. The transition to communism was to bring about significant changes in the social relations of Soviet society. The program declared that "under communism, there will be no classes, and socioeconomic and cultural differences, as well as differences in living conditions between the city and the countryside, will disappear. . . . Thus, communism will put an end to the division of society into classes and social strata."³³ On the road to communism, the social protection of the rural population was to be greatly improved so that the peasants "enjoy all forms of social security (pensions, holidays, etc.) out of kolkhoz³⁴ and state funds."³⁵ The program had important implications for the development of the socialist bloc, as it developed the idea that a gradual transition to a higher stage of communist society should take place in all socialist states "more or less simultaneously, within one and the same historical epoch."³⁶ Following the Soviet example, the BCP adopted a 20-year plan for Bulgaria's development at its VIII Congress in 1962, proclaiming as the main goal of domestic policy over the next two decades to "complete the construction of socialist society and initiate a gradual transition to communism."³⁷ Furthermore, the BCP announced that over the next 20 years "the main differences between the city and the countryside will be overcome."³⁸

The political and ideological changes in the USSR in the following years further influenced the policy of the Communist Party in Bulgaria toward the peasants. The revisions in the framework of official ideology in the Soviet Union made under the leadership of Leonid Brezhnev were decisive. Thus, the new concept of "developed socialism" had a massive impact on the development of the social security system in

31. SRBNA of July 2, 1975, 139–140.

32. The Cooperative Farmers' Pension Act entered into force on July 1, 1975. In: *State Gazette* No. 53 (1975).

33. Program of the CPSU (1963), 71–72.

34. Kolkhoz is a Russian collective farm.

35. Program of the CPSU (1963), 91.

36. Program of the CPSU (1963), 134.

37. Resolution of the VIII Congress of the BCP (1962), 858.

38. Resolution of the VIII Congress of the BCP (1962), 864.

Bulgaria in the early 1970s. Of great importance was the report of the Central Committee of the CPSU presented by Leonid Brezhnev at the XXIV Party Congress in 1971, in which he officially declared that the Soviet Union had entered a new phase of development, that of a “developed socialist society.”³⁹ Among the distinctive features of this new phase was that raising the population’s standard of living was declared the “supreme aim of the Party’s economic policy.”⁴⁰ Moreover, Brezhnev emphasized that the Communist Party’s measures in the area of social policy would be aimed at “strengthening the unity of Soviet society, bringing classes and social groups even closer together.”⁴¹ To achieve these goals, the CPSU planned a series of social policy measures over the next few years, including “raising the minimum pensions of collective farmers and applying to them the procedure for calculating the amount of pensions established for workers and office employees.”⁴²

The concept of “developed socialism” and the tasks that derived from it were quickly adopted by the ruling elite in Bulgaria. At the X Party Congress in 1971, the BCP announced its new program and declared the construction of a developed socialist society to be its “most important and immediate historical.”⁴³ In its new program, the party planned “a leap in the forces of production” to achieve “a high level of satisfaction of the material and spiritual needs of the people.”⁴⁴ An important promise in this new stage of development was “to bring the social classes further together.”⁴⁵ Shortly thereafter, the National Assembly adopted a new constitution that provided for a uniform social security system for the entire population.⁴⁶ The implementation of the resolutions of the X Congress began in December 1972, when a party plenum decided that “the process of achieving equality in social relations . . . between the class of cooperative farmers and the working class . . . will be completed in a short time.”⁴⁷ At this plenum, the minister of Labor and Social Welfare, Mišo Mišev, declared that measures for the “legal equalization of the pension conditions of cooperative farmers with those of the employees will take place . . . by 1975.”⁴⁸

In terms of national factors, it was economic and political considerations that triggered egalitarian social security reforms in Bulgaria during the 1960s and 1970s. In the early 1960s, the BCP took first measures to reduce the differences in social protection between workers and cooperative farmers by raising peasants’ old-age pensions and expanding their social protection. These reforms were politically and economically motivated and were intended to solve the socioeconomic problems resulting from the

39. 24th Congress of the CPSU (1971), 47.

40. 24th Congress of the CPSU (1971), 50.

41. 24th Congress of the CPSU (1971), 334.

42. 24th Congress of the CPSU (1971), 54.

43. Program of the BCP (1971), 41.

44. Program of the BCP (1971), 45.

45. Program of the BCP (1971), 65.

46. The new constitution, known as the Zhivkov Constitution, was officially promulgated by the National Assembly on May 8, 1971, and Art. 42 provided for a uniform social security system.

47. CDA F.1B, op.58, ac.71, 11.

48. CDA F.1B, op.58, ac.72, 102.

country's rapid modernization. After World War II, the Bulgarian economy underwent a huge sectoral shift. Between 1948 and 1960, the share of industry in net material product increased from 23% to 48%, and that of agriculture decreased from 59% to 27% (Lampe 1986, 153). During the same period, the share of the labor force employed in industry increased from 7.9% to 21.9%, whereas that of agriculture decreased from 81.9% to 54.7%.⁴⁹ Industrialization and collectivization of agriculture led to rapid urbanization, with the share of the urban population almost doubling in the first two decades after World War II, reaching 46.5% in 1965.⁵⁰ Initially, industrial development benefited greatly from urbanization. However, the situation changed dramatically in the second half of the 1950s when the industry was unable to absorb the increasing number of surplus rural workers, leading to high unemployment, housing shortages, and huge supply problems in the cities (Brown 1970, 85; Lampe 1986, 149; Crampton 1987, 184). Convinced that the "differences in pension and social security benefits between cooperative farmers and workers" were one of the "main causes of the massive exodus from the villages,"⁵¹ the BCP decided in the early 1960s to take measures to improve the social protection of TKZS members. By increasing old-age pensions and extending social protection, the government aimed to ensure that peasants "in the near future . . . receive pensions and social benefits similar to those of workers," which in turn was intended to limit rural-urban migration and at the same time provide material incentives to increase agricultural productivity and thus ensure the supply of food for the population.⁵²

Two important trends in agriculture concerning the Communist Party in Bulgaria in the second half of the 1960s triggered further substantive improvements in social protection for farmers and ultimately contributed to the introduction of a unified pension system in 1975. First, the decline in agricultural growth rates (Boyd 1990, 73) was particularly worrying in a country like Bulgaria, where agriculture was a key factor in raising the population's standard of living. Agriculture not only was important for supplying the population with food and providing raw materials for the industry but also accounted for a large share of the country's exports. Bulgaria was the country with the largest export rates of agricultural products in all of Eastern Europe (Lampe 1986, 181), with a share of 59.3% of all exports in 1960 and 47.3% in the years 1966–70 (Marčeva 2010, 404). Second, the persistent decline in the agricultural workforce, which led to a labor shortage in agriculture in the second half of the 1960s, was also considered problematic. According to a report⁵³ discussed at a party meeting on March 21, 1967, rural migration created serious problems in securing the labor force in agriculture. The labor shortage was so serious that the state had to deploy unskilled workers to the villages during the harvest season.⁵⁴ The report also stated that since "social security disparities are largely the cause of the abnormal exodus of cooperative farmers from villages,"

49. *Statistical Yearbook* 1965, 70.

50. *Statistical Yearbook* 1969, 12.

51. CDA F.i.B, op.6, a.c.4404, 26.

52. CDA F.i.B, op.6, a.c.4404, 16–20.

53. CDA F.i.B, op.6, a.c.6610, 15–24.

54. CDA F.i.B, op.6, a.c.6610, 16–17.

measures to improve the social protection of farmers were “urgently needed.”⁵⁵ Among the recommended measures were an increase in old-age pensions and the introduction of cash benefits for cooperative farmers.⁵⁶ In order to encourage young cooperative farmers to remain in the villages, it was considered necessary to abolish the differences in old-age pensions between farmers and workers up to 1975.⁵⁷ This was justified as follows: “In case it is not announced that the unification of the pension system will take place by 1975, the youth will think that the differences in old-age pensions between farmers and workers will continue to exist in the future . . . which would cause them to continue to leave the villages, the age composition of the labor force in agriculture will continue to deteriorate, which will have a negative impact on the agricultural sector.”⁵⁸ In line with these recommendations, the BCP decided to immediately grant cooperative farmers the right to the same cash benefits and allowances as workers (with the exception of family allowances) and to increase their old-age pensions. In addition, the party decided to announce that from 1975 on the pensions of cooperative farmers would be calculated and paid according to the conditions for workers.⁵⁹

In the first half of the 1970s, under the influence of ideological developments in the USSR, building a developed socialist society became the main task of the communist regime in Bulgaria. Together with economic and social considerations regarding the negative developments in the agricultural sector, this triggered three interrelated processes in agriculture aimed at achieving social homogeneity in Bulgarian society. The first process was the industrialization of agriculture through the establishment of agro-industrial complexes (AICs), which were to lead to concentration and specialization in agriculture and thus to a significant increase in production and a reduction in prices for agricultural products. The establishment of AICs was also to contribute to the gradual transformation of agricultural labor into industrial labor, the elimination of the difference between the two forms of ownership in agriculture, the dissolution of the differences between urban and rural areas, and thus the creation of a unified socialist society.⁶⁰ The second process began in 1974 with the BCP’s decision⁶¹ to gradually abolish the autonomy of TKZS, which was intended to eliminate the difference between the two forms of ownership (cooperative and state ownership) in Bulgarian agriculture. This process ended in early 1975 when AICs were declared as the main form of economic organization in agriculture, which in practice meant the nationalization of the land. The third process, the final elimination of differences between peasants and workers in the area of social insurance, began in December 1972 with the official announcement by the minister of Labor and Social Affairs that “in fulfilment of the directives of the X Congress of the BCP” for the construction of a developed socialist society, “by 1975 there will be legal

55. CDA F.1B, op.6, ac.6610, 16–17.

56. CDA F.1B, op.6, ac.6610, 17.

57. CDA F.1B, op.6, ac.6610, 22.

58. CDA F.1B, op.6, ac.6610, 22–23.

59. CDA F.1B, op.6, ac.6610, 1–3.

60. CDA F.1B, op.35, ac.1331, 2–5.

61. CDA F.1B, op.35, ac.5115, 6.

equalization in the field of old-age protection of cooperative peasants and workers.⁶² The bill to equalize the pension conditions of cooperative farmers with those of workers was introduced in the National Assembly on July 1, 1975, and passed unanimously the next day. Thus, a unified social security system was created in Bulgaria.

CONCLUSION

Social policies in Eastern European countries during communist times are typically assumed to have followed a common pathway with universal social services provided by the state (Cook 2007, 1). However, when we are taking a closer look at social policy trajectories in former communist countries, a great heterogeneity across countries in the communist bloc becomes visible. This heterogeneity is particularly evident in the timing and design of pension reforms targeting the rural population. In contrast to most other Eastern European countries, where private farmers only became entitled to pension benefits several decades after the imposition of communism, in Bulgaria they were already covered by the public pension system in the early 1940s. Moreover, Bulgaria was the first communist state in Eastern Europe to create a comprehensive pension system for cooperative farmers and was among the few countries in the Eastern Bloc to fully integrate farmers into the general pension system creating an egalitarian social security system for the whole population as early as 1975.

In this article, we have explained why Bulgaria introduced universal pension insurance comparatively early by addressing the two most important pension reforms after the Communist Party took power in a military coup in 1944 until the collapse of the Eastern Bloc. Drawing on archival and document research, we have focused on the pension reform for farmers in 1956 and the introduction of a unified pension system for workers and farmers in 1975. The analysis of the two major pension reforms during the communist era demonstrates that besides the external pressure from the USSR, national factors and peculiarities significantly shaped Bulgarian communist pension policy. In particular, the important role of the peasants before but also after the communist takeover was crucial for the rapid introduction and comparatively generous design of the unified pension insurance system. Moreover, from the mid-1950s Bulgaria became one of the largest exporters of agricultural and food products within the Eastern Bloc, which also pushed the early integration of farmers in Bulgaria into the public social security system. External political pressure from the Soviet Union, as well as pre-communist legacies in social security legislation for the rural population, contributed significantly to Bulgaria becoming one of the first socialist states to incorporate cooperative farmers into the public pension system. Thus, since private farmers were already covered by a special old-age insurance program before the communist takeover, the introduction of a more generous pension insurance system for cooperative farmers was an important factor in accelerating the collectivization process and making Bulgaria the first Eastern European state to achieve full collectivization of agriculture. The political

62. CDA F.1B, op.58, ac72, 102.

and ideological developments in the Soviet Union in the 1960s and 1970s, combined with the demographic and economic problems of Bulgarian agriculture, played a decisive role in promoting egalitarian social reforms and led to the early establishment of a unified social insurance system for the whole population.

What can we learn from the Bulgarian case? Despite a remarkable expansion of social policy in all communist states of Eastern Europe during the Cold War in line with communist ideology, communist welfare states were not a homogeneous group but rather showed considerable differences, especially with regard to the social protection of peasants. Universalism of welfare provision was a common feature of communist welfare states, yet the extent to which social protection was provided in an egalitarian manner varied considerably between countries. This article is a plea to focus more on social policies within the communist sphere of influence during communist times and to consider the heterogeneity of welfare provision among countries and its underlying determinants. Understanding the heterogeneity of communist states and differences in social policy-making is necessary for the ability to understand and explain today's social policy reforms in post-communist states. ■

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