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(UN)DISCOVERY OF OLD PEOPLE IN SOCIALIST YUGOSLAVIA: THE KNOWLEDGE POLITICS OF INEQUALITY

Abstract

This article results from an exploration in the production of knowledge about old age in socialist Yugoslavia. It particularly discusses the relationship between research and policy making, highlighting to contradictory tendencies: on the one hand, government bodies in Yugoslavia commissioned and funded substantial research in the social problems of old people, starting in the mid-1960s. On the other hand, policy responses remained deficient. I argue that one reason was the geographic concentration of problems of old age in villages, which were generally neglected by the government; this was manifest in the lack of pension coverage for private farmers and often miserable living conditions. My article is based on a close reading of Yugoslav social-science research on old people and on the analysis of archival documents about social policies in this arena. There is a particular focus on the Socialist Republic of Macedonia, where large-scale surveys of the situation of old people were carried out in the 1970s and 1980s, but where the government response remained insufficient. By the late 1980s, experts seemed to have given up the hope that their research might help to improve alleviating the lot of old people. My contribution is also understood as a rediscovery of a rich research tradition that fell into oblivion during the wars of the 1990s. Yet if we want to understand the dynamics of social inequality in Yugoslavia – as one of the reasons of its dissolution – we should listen to those contemporaneous voices.

Keywords: Yugoslavia, Sociology, Old people, Pensions, Poverty

Introduction

Socialist Yugoslavia was growing old before it became rich—this is how *The Economist* might have framed the issue, had it reported on the topic. (I am paraphrasing a 2023 *Economist* article titled “Large parts of Asia are getting old before they get rich”; The Economist, 2023.) Prominent Yugoslav experts would likely

have agreed. This is evident in an article by Berislav Šefer, one of Yugoslavia's leading scholars on living standards and a professor of social policy and social work. He also served as vice-president of the federal government from 1974 to 1978. Šefer, who earned a PhD in economics in 1966, was part of a distinguished group of Yugoslav social scientists who combined rigorous research with a sincere commitment to improving social policy (Naučno Društvo Srbije, n.d.). Leading Yugoslav sociologists called upon sociology to produce knowledge that would be useful to improve planning, fasten development, and reduce inequality–and in the 1980s, to help solving the deep economic and pollical crisis of the country (e.g. Bolčić, 1977; 1983; 1987: 91–97). A notable feature of this group of scholars was their engagement in international debates and activities, at a time when social scientists in both "developed" and "developing" countries believed they could help governments to improve policymaking. Šefer himself received postgraduate training in Chicago and Berkeley and worked with organizations such as the OECD (Yugoslavia was an associate country), UNESCO, and the United Nations Research Institute for Social Development (UNRISD), among others.

In 1989, he summarized the findings of a major study on the "Economic and Social Consequences of the Ageing of the Yugoslav Population" in an article published in the Belgrade-based journal *Socijalna Politika* (Šefer, 1989). The survey had been commissioned by the Yugoslav Conference for Social Activities, a nationwide initiative involving social work and social policy institutions. Šefer emphasized that population aging had long-term social, economic, and political implications. While he stressed that aging should be seen as a "normal process" rather than a problem in itself, he identified specific challenges facing Yugoslavia. The country's age structure resembled that of OECD nations, and its pension spending—around 9% of GDP—was similarly high. Yet monthly pensions remained meager, ranging from 70 to 100 USD. Šefer pointed out that although the aging process was entirely predictable, Yugoslavia had failed to address its economic consequences in a systematic way. This stood in sharp contrast to OECD countries, where the sustainability of pension systems was a subject of intense scrutiny. Šefer criticized Yugoslav policymakers for neglecting the issue, despite the inevitable rise in pension and healthcare costs. The statutory retirement age—60 for men and 55 for women—remained low, and early retirement was relatively easy to obtain. The situation in rural areas was especially dire: the countryside was aging faster than urban areas, yet agriculture remained neglected by the state, "all that out of fear from the restoration of capitalism" (ibid., 31).

Šefer's analysis was sharp, and his warnings were prescient. But policymakers did not heed his call to address the pension system and the needs of the elderly. Instead, they became increasingly preoccupied with dismantling the country. With Yugoslavia's dissolution, a rich line of inquiry came to an end. Since the mid-1960s,

various levels of government had sponsored extensive research into the condition of older people. Reconstructing and contextualizing this body of knowledge is the main objective of this paper. The central research question is: How did sociological research on aging relate to policymaking? In other words, did the knowledge produced by experts—often at the behest of the state—lead to policy responses aimed at addressing the identified problems? This focus also implies that the rich ethnographic research touching upon the livelihoods of old people remains outside of the purview of this article, as it was very distant from the policymaking field. My exploration is situated within the broader social transformations that marked the period from the late 1960s to the breakup of Yugoslavia. In the early 1970s, when scholarly interest in aging peaked, Yugoslavia still had a relatively young population. By the late 1980s, however, the country faced pronounced demographic aging just as it was on the verge of collapse. In the meantime, the problems of the elderly remained unresolved.

Among socialist countries, Yugoslavia likely produced the most in-depth and critical studies of its own social issues, including those related to aging. This was made possible in part by fewer restrictions on academic freedom compared to other communist regimes—even though Yugoslav authorities at times purged universities, most notably in the early 1970s. Furthermore, Yugoslavia was home to a robust sociological tradition that combined empirical rigor with policy-oriented research. The institutional foundations of sociology and the social sciences were strong: sociology, banned under Stalinism, was rehabilitated much earlier than in more orthodox state-socialist countries (Brunnbauer, Kraft, Schulze Wessel, 2011: 16–17). The Yugoslav Sociology Association was established in 1954; the Institute of Social Sciences (Institut društvenih nauka) in Belgrade was founded by the federal government in 1957; the Institute for Social Research in Zagreb followed in 1964; and the journal *Sociologija* was launched in 1959, with other journals like *Sociologija sela* (1963) soon appearing. Yugoslav sociologists were well-connected internationally, employed state-of-the-art methodologies, and benefited from international funding for applied research (Lazić, 2016: 6–11). Yugoslav social scientists—such as those elsewhere in that time—hoped to contribute to concrete technical solutions as well as to "enlighten" policymakers about the social problems they identified in their research (see Mesny, 1998: 162).

The strength of applied sociology in Yugoslavia was further demonstrated by the existence of university departments for social work—Šefer himself founded one at the University of Belgrade—and specialized institutions that combined research with policy advocacy. These included the Institute of Social Policy in Belgrade, which had its own journal (*Socijalna politika*), the Institutes for the Advancement of Social Activities in Skopje and Sarajevo, and the Provincial Institute for Social Research in Novi Sad, and so on. Researchers participated in numerous consultative

bodies—a reflection of Yugoslavia's expansive system of self-management. They did not shy away from addressing issues such as poverty, inequality, and social differentiation (Lazić, 2011: 93–99), including the difficulties faced by the elderly. The press frequently reported on these issues, indicating a broad public interest in social matters. There was a shared belief that, while Yugoslav socialism had its flaws, it could be improved through evidence-based social policy. Policymakers and administrators at various levels of government often sought scholarly input, and the state—primarily the republics and autonomous provinces—provided substantial funding for social research.

However, as I will argue, this did not mean that the government was especially responsive to the recommendations of social scientists. As I have already shown in the case of migration expertise, the gap between scholars and the government widened significantly during the 1980s (Brunnbauer, 2025). Šefer's article exemplifies this dynamic: leading researchers concluded that resolving social problems would require structural reforms, including economic liberalization. But this was a message that the League of Communists, in its various regional branches, remained reluctant to embrace. As a result, the problems mounted while expert knowledge was often ignored. This was also the fate of the knowledge produced on old age.

Inequality in Yugoslavia: Where is Old Age?

Recent historical scholarship on Yugoslavia started to become interested in questions of inequality. Rory Archer, Igor Duda, and Paul Stubbs for example noted that

> *Inequality and its public perception increased over the course of the state's existence after an initial post-World War II burst of social mobility. By the 1980s Yugoslavia was increasingly divided on a socio-economic as well as national basis, with the two becoming ever more closely linked* (Archer, Duda, Stubbs, 2016: 3).

The authors of this instructive volume highlight the wealth of contemporaneous research on inequality in socialist Yugoslavia. They reference a broad array of themes and factors identified by Yugoslav scholars as key dimensions of inequality—including housing, education, healthcare, gender, unemployment, and income. However, they overlook age as a crucial predictor of poverty, particularly when combined with rural residence. None of the empirical contributions to the volume examine the situation of older people, and only one explicitly mentions rurality as a significant factor of marginalization (Ströhle, 2016).

This omission reflects a broader pattern found in seminal Yugoslav works on inequality from the 1980s. For instance, Eva Berković's 1986 book analyzed a wide range of factors—such as personal income, informal earnings, employment, housing policy, education, child welfare, healthcare, privileges, social security, and regional disparities—and identified "the differences between the employed and unemployed" as the main axis of social inequality. Yet, she did not mention age at

all (Berković, 1986). Another large-scale sociological survey from the same decade was similarly silent on the issue of aging, despite its clear intersections with many of the inequality factors discussed (Popović et al., 1987). Even the excellent research on social stratification led by Mladen Lazić during this period did not explore the relationship between aging and inequality (Lazić, 1987).

A common feature of both earlier and more recent research on social inequality in socialist Yugoslavia is its dominant class-based perspective. Most Yugoslav sociologists focused on identifying various social classes or strata, primarily defined by income and educational attainment, and measuring disparities between them (cf. Lazić, 2016). Although some engaged with the concept of intergenerational mobility, they rarely employed a life-course perspective that would allow for analysis of changes in "class status" over the lifespan, particularly in old age. Moreover, they showed little interest in the living conditions of the rural population, even though it made up nearly half of Yugoslavia's total population—and it was in rural areas where the social hardships of old age were most concentrated.[1]

My exploration of the archaeology of knowledge production about old age as a social problem in Yugoslavia is therefore also an effort to shed light on a doubly marginalized group: those who were both elderly and rural. These individuals were largely forgotten—not only by the governments of their time but also by contemporary historians. Small-scale, aging private farmers may not have seemed "sexy" enough to attract scholarly attention, despite representing a demographically significant segment of society (Allcock, 2000).

Studying Old People and their Problems

If one were to pinpoint the historical moment when systematic interest in the situation of older people began in Yugoslavia, 1968 would be a compelling candidate. That year, the federal government turned its attention—perhaps for the first time—to the social problems of the elderly in rural areas.[2] This newfound concern sparked a series of research initiatives. By 1970, the Institute for Social Policy in Belgrade had compiled a comprehensive set of statistical tables on the condition of elderly citizens in Yugoslavia, plus a separate volume with international comparisons. Based on a survey of approximately 3,000 individuals across the country and analysis of census data, the project was led by Yves Nedeljković, a leading social policy researcher at the time, and funded by the U.S. Department of Health, Education and

[1] According to Yugoslavia's last full census of 1981, the urban population made up 46.5% of the country's total population. The share of the farming population was recorded at 19.9% of the total population but this is a notoriously fuzzy category because many rural households combined income from wage labour and farming (Savezni zavod za statistiku, 1990: 130).

[2] Arhiv Jugoslavije (AJ), f. 587: Savezni savet za zdravstvo i socijalnu politiku, f. 4, 7. sednica, 7 June 1968.

Welfare (Institut za socijalnu politiku, 1970a). Once again, significant sociological research in Yugoslavia owed its realization to foreign funding. This also illustrates the broad support of governments in the United States and Europe for the development of social sciences after the Second World War hoping that such research might help policy planning (Mesny, 1998: 162). The most important domestic reason for growing research on the social situation of old people was the establishment of specialized institutions charged to conduct social work but also to provide expertise to the government, which often employed also sociologists. The Institute for Social Questions in Skopje, for example, was established by a decision of the government in September 1961. Social Work became also a study programme at universities. These organizations turned into institutionalized producers of knowledge about the social.

The mentioned survey by the Belgrade-based Institute for Social Policy explored general issues but also the minutiae of personal (dis)comfort, asking questions such as whether respondents could still trim their nails and, if not, who performed this task. In rural areas, the most frequent answer was "daughter-in-law" (Institut za socijalnu politiku, 1970a, table 2/17). The survey made clear that conditions for the elderly were significantly worse in the countryside than in urban centers. For instance, only a minority of adult children who had left their parents' village households provided financial support (ibid., table 2/66). 34% percent of rural respondents reported feeling lonely often, and 37% sometimes (ibid., table 4/15). Just 14% of rural households had indoor plumbing, and 58% stated that their outhouses were more than ten meters from their homes (ibid., table 4/54). Half of the elderly in villages did not own a radio, compared to only 19% in urban areas (ibid., table 4/65). While a systematic comparison between the situation of old people in Yugoslavia and in other European countries goes beyond the scope of this article—and is not warranted, as my focus is the production of knowledge—this early effort included also a compilation of international comparative tables (Institut za socijalnu politiku, 1970b). These showed, for example, that old Yugoslavs felt much more often lonely then their peers in Denmark, Great Britain and the United States, but also in Poland (ibid., table IX-9). The income differentials among old people in Yugoslavia were also astonishing: for instance, the average income of a (former) female white collar worker aged 65 years or more was only 28% more than that of a female farmer in Denmark but in Yugoslavia, the ratio was 3.7 to 1 (ibid., table XIII-12).

Similar studies emerged across Yugoslavia's various republics. For example, an extensive investigation into the socioeconomic hardships faced by elderly households in the villages of Vojvodina was published by the Provincial Institute for Social Research (Pribić, 1970). In Macedonia, a large interdisciplinary government-sponsored project in 1971 led to a comprehensive book (Sinadovski, Nedelkovikj, 1975). A 1972 special issue of the journal *Sociologija sela* ("Sociology

of the Village") featured six articles on different aspects of life for the rural elderly (vol. 10, no. 37–38). In 1973, Miroslav Živković published a dissertation on elderly life in Yugoslavia based on a survey of 3,000 people across six cities: Belgrade, Zagreb, Sarajevo, Niš, Bitola, and Celje. His inquiry began with the question: "Why does society not pay the same attention to the elderly as to children, given that both are unable to be self-sufficient?" (Živković, 1973: 8). While society may have fallen short, scholars increasingly took up the challenge throughout the 1970s (Manojlović, 1991: 7–9). In Yugoslavia, as elsewhere, the social survey became the dominant method for producing knowledge about old age. As Stephen Katz noted in his study of gerontological research, the social survey "combined political advocacy with statistical methodology" (Katz, 1996: 73). By applying such methods to old age, researchers could "translate data on the ages, behaviors, and propensities of representative sample groups into set characterizations of the elderly population as a knowable object of study" (ibid.).

A milestone in the institutionalization of interdisciplinary research on aging in Yugoslavia was the launch of the *Gorontološki zbornik* (today *Gerontologija*) in 1973. Initiated by the Institute for Social Policy in Belgrade with support from the Ministry of Health and Social Policy of the Socialist Republic of Serbia, among others, the journal reflected a commitment to multi-faceted and comprehensive social policies toward the elderly. Closely linked to the newly established Gerontological Society of Serbia, the journal addressed the social, economic, and medical dimensions of aging. Its inaugural preface declared: "The aging of our population, which becomes more evident and whose further trajectory is clear, demands corresponding social policies and actions across multiple domains of public engagement" (*Predgovor*, 1973). The first Yugoslav Congress of Gerontology—a major interdisciplinary event with over 400 contributions—was held in Belgrade in 1977, followed by similar congresses in Ljubljana (1982) and Zagreb (1986). These research efforts garnered international attention; the European Social Research Committee of the International Association of Gerontology held its 1976 symposium in Dubrovnik (Dooghe, Helander, 1979).[3]

From the outset, researchers focused particularly on the rural elderly – which reminds a remark by William Freudenburg and Kenneth Keating (1985: 578) that "Ever since the founding of the field, rural sociologists have shown a commitment to policy-relevant research." In Yugoslavia, demographic changes in the countryside—referred to as *senilizacija* (senilization) by one leading scholar (Livada, 1972: 7)—coupled with the ongoing crisis of agriculture, sharpened academic concern for the aging rural population. One of the first major research projects in this area was

[3] The lone Yugoslav scholar participating in the symposium was Nada Smolić-Krković, author of a handbook on gerontology for social workers (1974) and one of the authors of the longitudinal study on old people in villages in Croatia (Smolić-Krković, Milinković, Visin, 1977).

a longitudinal study in the Socialist Republic of Croatia, conducted by the Institute for Social Work and funded by the U.S. government through its technical cooperation with Yugoslavia (Smolić-Krković, Milinković, Visinski, 1977: 85–91). It was Yugoslavia's first longitudinal household survey, following the same group of people across three waves (1969, 1973, and 1974). It began with 1,583 individuals, of whom 956 were re-interviewed five years later. The questionnaire was adapted from similar studies conducted in the United States and Western Europe.

This project exemplified both the international collaboration underpinning Yugoslav social science and the robustness of rural sociology within the country. Yet, despite broad recognition that socioeconomic issues were most acute in the countryside, there was little sustained effort to improve rural living conditions. Communist authorities harbored deep reservations about private farming, the largest private sector in Yugoslavia's socialist economy. In many rural areas, the presence of the state was minimal, and welfare services were sparse.

Elderly individuals—especially so-called households of the elderly (*staračka domaćinstva*)—were seen as the primary casualties of Yugoslavia's modernization and urbanization. As early as 1968, a federal government report based on earlier research by Petar Manojlović (1965) described the situation in villages as "very complex and urgent."[4] The report lamented that the issue had received "neither complex attention nor social pathology," and recommended wide-ranging socio-economic and legal reforms, including pensions for peasants.[5] In line with Yugoslavia's social policy ethos, the problem was seen not as a familial obligation but as a societal responsibility. The same report noted that while Yugoslavia's overall population remained relatively young, the number of people aged 65 and older was rising—from 1.14 million in 1961 to an expected 1.6 million in 1971. In rural areas, aging was more severe and accompanied by deeper social challenges. Many older people were unable to farm their land, had no alternative income, and lacked access to public services.[6] A study in Serbia revealed that in 1971, only 22% of individuals over 65 received any pension or financial support; most of the remaining 78% were peasants with no income other than subsistence farming (Paunović, 1973: 189). The question of extending pensions to private farmers would remain unresolved for decades.

Among the most ambitious projects responding to this research gap was a 1975 study in the Socialist Republic of Macedonia, led again by Yves Nedeljković. Funded by the Self-Managed Community of Interest for Social Protection, it surveyed 1,034 individuals aged 65 and older. At the time, only 5.8% of Macedonia's popu-

[4] Savezni savet za zdravstvo i socijalnu politiku: *Socijalni problemi ostarelih lica na selu*. Beograd, april 1968. In: Arhiv Jugolavije, f. 587, f. 4.

[5] Savezni savet za zdravstvo i socijalnu politiku, 7. sednica, 7 June 1968, točka 2: „Socijalni problemi ostarelih lica na selu". in: AJ, f. 587, fasc. 4, page 3.

[6] Iidem.

lation was over 65, but rural outmigration was increasing this share rapidly in the villages. The authors highlighted how state neglect and the breakdown of extended family structures left the elderly increasingly vulnerable (Sinadovski, Nedeljković, 1975: 7–25). Only 20% of the surveyed elderly had an income, 30% still worked their land, and 50% were dependent on others. The average landholding was one hectare—insufficient for self-sufficiency. Nearly 38% reported being worse off than in the past. Social benefits were inadequate and unevenly distributed, and the republic had just four care homes with 473 spots. Only 25% of respondents were covered by pension and health insurance; 62% had health insurance only (ibid., 111).[7] Although three-quarters lived in multigenerational households, financial support from children was rare when they lived separately (ibid., 113–42). In 1971, only 53,163 individuals received old-age pensions in Macedonia, and private farmers—still a significant demographic—were ineligible (ibid., 182–83; cf. Maksimović, 1974). The study concluded that the problems faced by the elderly exceeded the capacity of existing institutions to respond (ibid., 242).

The most extensive research on old age in Yugoslavia focused on the countryside, where both experts and policymakers identified the most pressing issues. The concept of the "old-age household"—consisting solely of individuals aged 60 or older—gained prominence. An early article in *Sociologija sela* (1963) described these households as a natural byproduct of economic development but highlighted their implications for agricultural productivity (Marković, 1963: 22). Rural sociologist Svetozar Livada was a pioneer in this area. In a 1966 article he concluded that "The ageing of the population happens especially in rural, village areas (…)" (Livada, 1966: 9). Livada highlighted also the psychological costs of ageing. In such villages "optimism dies and more and more often, so-called 'complex minorization' appears" (ibid., 10). The lack of an institutional responses to this development reinforced the pervasive pessimism in the countryside which intensified the wish of young people to leave the village. These insights were drawn from a survey of 726 elderly rural households, which found that 57% of them had been left behind by their children (Livada, 1966: 9–10; see Erlich, 1966, on the dissolution of the so-called *zadruga*).

Livada, a founding editor of *Sociologija sela*, is another impressive figure. He combined rigorous scholarship with a deep commitment to Yugoslavia and antifascism. Born in 1928 in Slunj, Croatia, he joined the Partisans as a youth and was seriously wounded, delaying his academic career for many years. He eventually earned his PhD in rural sociology from the University of Zagreb and served on the FAO's rural sociology advisory group from 1963 to 1972 (Arbutina, 2022). Livada was a

[7] Health care coverage for peasants had been introduced in Yugoslavia already in 1960 but its full implementation in all parts of the country took a decade.

passionate advocate for the rural elderly. In a 1972 special issue of *Sociologija sela*, he lamented the lack of attention to their plight, arguing that the dramatic condition of rural elders stemmed not only from the rural exodus but also from a societal failure of empathy. Three-quarters of Yugoslavia's 2.5 million elderly people lived in villages, without pensions, healthcare, or adequate housing. Many died as they had lived—overworked and neglected. In one survey, 50% of "old households" had only clay floors, a third had no electricity, and just a quarter had running water. Even familial support was often lacking. Livada blamed a broader societal erosion of solidarity, writing that "old people not only lived in a barbarian way but died in an even more barbarian one" (Livada, 1972: 11). For Livada and others, the key conclusion was that institutional responses were essential. Just as children's rights had been codified earlier in the 20th century, it was now time to articulate the rights of the elderly. In the same special issue, Ruža Petrović observed:

> *While the rural exodus is widely praised, its consequences—decreased birth rates and rural aging—are seen as problematic. But what is truly socially negative? That old people survive after long years of work? That they have not died before becoming dependent? The real social negative lies not in their survival, but in society's attitude toward them* (Petrović, 1972: 23).

The situation of elderly people in cities was apparently better, in large part because a greater share of them received old-age pensions and had access to better social services. Nevertheless, their circumstances were often marked by significant difficulties, as evidenced by Živković's extensive survey (Živković, 1973). One major issue was inflation, which steadily eroded the purchasing power of pensions—a problem that would become even more acute in the 1980s as inflation surged. Many urban elderly lived in poor housing conditions. In Živković's sample of 3,000 individuals from six mid-sized and large Yugoslav cities, 40% of apartments lacked a bath, 30% had no toilet, 27% were not connected to a sewage system, and 23% lacked running water. "To be old in such living conditions must be harder and sicker—and shorter," the author concluded.

Živković also highlighted striking inequalities: living conditions in old age were largely shaped by professional and educational background. Former white-collar workers generally lived in "much better conditions" than blue-collar workers, and within both groups, those with higher qualifications fared considerably better (ibid., 132–134). Although housing shortages were a general problem in Yugoslavia, elderly people appeared to face particular challenges, including a shortage of places in care homes. Social isolation was another critical issue. Elderly urban residents often experienced loneliness and exclusion from social and cultural life, similar to their rural counterparts. Many reported that their children did not care for them. Živković summed up this reality with grim conciseness: "they wait to die" (ibid., 244). Interestingly, those with higher educational attainment were more likely to

live with their children, suggesting that class differences may have been further exacerbated in old age by the combined effects of social inequality and the physiological consequences of aging.

As an intermediate conclusion, this substantial body of 1970s research on the social problems of the elderly in Yugoslavia constructed old people as a distinct population with specific needs, though internally differentiated by class and place of residence. Defined by the arbitrary boundaries of chronological age, the elderly became a measurable group. Paraphrasing Stephen Katz, they were constituted as a social problem—one that demanded targeted policies and specialized forms of knowledge (Katz, 2002: 49).

A Social Question between Attention and Negligence

Research into the social problems of elderly people, combined with the advocacy efforts of pensioners' organizations, was not entirely in vain. In a range of policy statements and normative documents from the early 1970s, the rights of pensioners and the need for social protection of the elderly were explicitly acknowledged. For example, the Tenth Congress of the League of Communists of Yugoslavia in 1974 called on self-managed communities of interest "to strive to achieve a maximum degree of satisfaction of the elementary needs of the aged" and advocated for the construction of more care homes (Manojlović, 1977: 129). Similarly, the parliament of the Socialist Republic of Serbia adopted a resolution on public care for the elderly in 1972, while the National Assembly of Macedonia passed a comparable document in 1979 (Association of Gerontological Societies, 1982: 48).

Nevertheless, the implementation of a coherent and effective policy to improve the situation of older people—particularly in rural areas—was impeded by the far-reaching decentralization of the Yugoslav state during the mid-1970s and, in the 1980s, by the growing financial problems of public institutions. This decentralization led to a fragmented welfare system, with different laws and regulations across republics and autonomous provinces, and inconsistent implementation by municipalities and self-managed "communities of interest". Another significant constraint stemmed from the close linkage between welfare entitlements and employment. Despite Yugoslavia's distinctive model of self-managed socialism, the workplace remained the core institution through which social benefits were accessed. The 1976 Law on Associated Labor, which fragmented enterprises into numerous Basic Organizations of Associated Labor, stipulated that "workers and other working-people shall set up self-managed communities of interest for pension and disability insurance and other forms of social insurance" (quoted in Association of Gerontological Societies, 1982: 48). As a result, welfare entitlements—including those for the elderly—were closely tied to the bargaining and financial power of individual self-managed units.

One major consequence of this employment-based welfare system was the exclusion of private ("individual") farmers from pension coverage. Despite the existence of more than 2.5 million private farms and over 3.8 million persons employed in private agriculture in the mid-1970s (OECD, 1980: 15), these individuals remained outside the pension system. Even the *Yugoslav Survey*, a publication aimed at showcasing the country's achievements to an international audience, conceded:

> *It should, however, be borne in mind that this system of social security does not encompass all persons aged 65 years and over because farmers are not covered by it. In all republics and autonomous provinces, possibilities are being studied for a gradual introduction of pension insurance for farmers* (Manojlović, 1977: 130).

Fears that the lack of pension coverage would further accelerate rural depopulation by incentivizing migration to urban areas prompted republican governments to introduce pension schemes for farmers during the 1970s. These began as voluntary programs and later became mandatory in some republics (Avzec, 1985: 57–66). Slovenia led the way by mandating compulsory pension insurance for farmers in 1972, followed by Vojvodina in 1977 and Macedonia in 1978. In contrast, Montenegro, Serbia, and Bosnia-Hercegovina introduced only voluntary schemes during this period. Croatia implemented obligatory old-age and invalidity pension insurance for farmers in 1980. Serbia mandated coverage for cooperative farmers in 1983 and extended it to all farmers only in 1986. A federal reform of the old-age and invalidity pension system in 1982 aimed to ease access to pension rights for "associated" peasants and other categories of farmers (Association of Gerontological Societies, 1982: 57). However, how this reform was implemented at the republic and provincial levels remains unclear. The benefits provided to rural populations under these schemes were typically inadequate. An English-language report prepared for the 1982 World Congress on Ageing in Vienna acknowledged this shortfall:

> *In view of the fact that the existing retirement system is not keeping sufficiently the changes in the social status and the actual needs of the aged, it shall be indispensable in the forthcoming period to bring the retirement scheme much more into line with the actual social needs, possibilities, and the social status of people of advanced age* (Association of Gerontological Societies, 1982: 40).

Behind such vague official statements were serious deficiencies. Kosovo and Bosnia-Hercegovina—two of Yugoslavia's most rural regions—never introduced mandatory pension insurance for private farmers. Only Slovenia, by far the country's most prosperous republic, succeeded in establishing a relatively comprehensive and functional old-age pension system for private farmers. In Serbia proper, the situation was dire: by 1982, only 3% of farmers—those in cooperatives—were covered by the pension system. Just 215 out of approximately 690,000 farmers were enrolled in the voluntary pension insurance program, and no old-age peasant

households were yet receiving pensions (Manojlović, 1982: 9). Some of the Yugoslav authors noted that Western countries had already introduced pension coverage for farmers by that time. Austria might serve as a good point of comparison, as it shared the same starting point of having no pension system for farmers immediately after World War Two: here, a mandatory pension transfer program for farmers was established in 1958 and in 1971, the farmers' pension insurance system was largely equalized with that of employees (Urbanetz, 1971).

The case of Macedonia illustrates the difficulties of providing adequate old-age pensions for private farmers. A 1978 law (in force from 1979) made pension contributions obligatory for private farmers (Sinadinoski et al., 1985: 183). However, pensions under this scheme were significantly inferior to those for wage earners. Farmers faced a higher retirement age (65 for men, 60 for women), and a minimum of ten years of contributions was required for eligibility—disqualifying many middle-aged and older farmers at the time of the law's introduction. The flat-rate pension was a mere 500 dinars per month in 1979—around one-tenth of the average wage. At that time the average monthly salary in Yugoslavia was 6,113 dinars, and 5,035 dinars in Macedonia (Statistički godišnjak SFRJ, 1989: 77). Only one pension per peasant household was granted, meaning that the wives of private farmers were classified as dependents. They were not entitled to individual pensions and could only "inherit" their husband's pension upon his death. Given that a majority of the agricultural workforce was female – 4.1 million out of 7.5 million in 1971 (Veselinov, 1987: 128; see also Penev & Kostić, 1984/1985) – this provision starkly contradicted Yugoslavia's professed commitment to gender equality. Moreover, a study conducted in the early 1980s among elderly villagers in Macedonia found that nearly three-quarters of respondents were unaware of the new pension law's provisions (Sinadinoski et al., 1985: 91). Many who were theoretically covered by the law were excluded in practice for various reasons.

While rural populations continued to wait for the benefits of socialist welfare in the form of old-age pensions, the number of pensioners—most of them urban—was rapidly increasing. By 1968, about 390,000 people in Yugoslavia received old-age pensions, 400,000 received disability pensions, and nearly 260,000 received family (survivor) pensions. Pension expenditures already accounted for 9% of national income, yet the value of individual pensions declined in relation to wages. In 1968, the average pension equalled only 51.7% of the average salary, a drop of more than six percentage points since 1963. Experts warned of the growing financial strain on the pension fund, predicting that it would need to expand by more than 10% annually to remain solvent. They also criticized the trend of early retirement, which exacerbated the system's burdens, when even the statutory retirement age was only 55 for men and 50 for women (Vaughan, 1965: 387–90).

A Fracturing Research-Policy Nexus

While the proliferation of self-management communities of interest and the decentralization of social policy complicated the delivery of systematic solutions to the social problems of the elderly, it also facilitated sustained research efforts into these issues, sponsored by various social policy institutions (Manojlović, 1981). The yearbook *Gerontološki zbornik* regularly published articles summarizing large-scale research projects and reporting on the conditions of older people across different regions and republics of Yugoslavia. This also indicates that political interest in social problems in general and the situation of old people in particular translated into action – for example by establishing a decentralized system of organizations for social work and, as already mentioned, creating flagship institutes for social policy practice and research in the main cities of the individual republics.

The productivity of this infrastructure for knowledge production can be illustrated by the Socialist Republic of Macedonia, which became a particularly active site for socio-gerontological research, evident in frequent reports in the Gerontological yearbook. For instance, in 1978, the Republic Self-Managed Community of Interest for Pension and Disability Insurance initiated a study on residents of an old-age home in Skopje (Darkovski et al., 1982), funded by the Republic Institute for the Advancement of Social Activities (Republički zavod za unapreduvanje na socijalnite dejnosti). This survey, one of the first comprehensive assessments of institutionalized elderly in Yugoslavia, questioned 144 residents about their needs, focusing on personal independence, autonomy, social and cultural engagement, housing conditions, and nutrition. At that time, around three-quarters of older Macedonians (aged 60 and above) lived with their children, a living arrangement widely considered socially preferable. However, the authors noted a gradual erosion of the traditional three-generational family, predicting a decline in co-residence and a corresponding increase in demand for institutional care (ibid., 35). One way, how the anticipated need of specialized housing for old people could be met, was the creation of earmarked apartments for pensioners in regular apartment blocs, combined with communal facilities. Such housing prevented the stigma of retirement homes and helped to maintain the autonomy of old people. In the early 1970s, there were 28 such "*stanbeni punktovi*" in Macedonia, providing accommodation for about 450 pensioners. The pension insurance funds co-funded these apartments (Sinadovski and Nedelkovikj, 1975: 203–5).

Another large-scale project in Macedonia exemplifies the heightened attention given to the rural elderly. Between 1980 and 1983, researchers affiliated with the Republic Institute for the Advancement of Social Activities conducted a representative survey of rural "old-age households" (*starečki domaćinstva*) (Sinadinovski et al., 1983; summarized in Sinadinovski, 1984). Interviewing 794 individuals with statistical support from local social work centres, the findings were sobering.

Villages were rapidly aging as urbanization and deagrarianization advanced. With fewer able-bodied labourers remaining in the countryside, much arable land lay fallow—on average, 56% of farmland in elderly households was unused. Leasing was seldom an option due to a lack of interested tenants, and many heirs showed little interest in farming. The study warned that significant tracts of arable land were at risk of being lost to agriculture entirely. Due to the geographic dispersion of families, many elderly parents received minimal support from their children; the study found that 60% of offspring and grandchildren failed to provide adequate care. Instead, neighbours emerged as the main support network, their assistance described as "more ethical" than that of relatives. A staggering 91% of surveyed elders reported feelings of loneliness. Living conditions were poor, with most homes primitive and lacking basic hygiene—few had indoor plumbing or running water. For the 65% of respondents with impaired mobility, meeting even basic needs was a daily struggle. Social and medical services offered scant relief; only 30 of 112 surveyed settlements had any form of medical service, and merely twelve had a permanent doctor. The researchers poignantly described the plight of the rural elderly:

> *They spent their youth and adolescence in a different moral and social system, one in which old people were respected and their safety guaranteed; now, as they age, that system no longer functions. The old production system and patriarchal norms have dissolved, but the new socialist society has yet to establish a holistic care system for elderly farmers* (Sinadinoski et al., 1983: 183).

A similar survey by the Belgrade-based Institute for Social Policy in the late 1970s, led by Petar Manojlović (1980)—a prolific author and advocate for elderly needs—highlighted comparable challenges in Serbian villages. Case studies across diverse geographic areas revealed that mountainous villages suffered most from rural out-migration, while larger lowland and peri-urban villages showed somewhat improved living conditions. Most surveyed elders (96%) owned arable land and continued farming. However, a majority found their children either unable or unwilling to support them sufficiently. Interestingly, while 20% of elderly respondents rated their living conditions as "very concerning," only 2.7% of social workers and 9% of village functionaries saw the situation as that dire, though most still regarded it as unsatisfactory (Manojlović, 1980: 39).

The late 1970s and early 1980s surge in gerontological research was also motivated by international developments. Yugoslavia participated in the 1982 World Congress on Ageing in Vienna, preparing a national report synthesizing findings from across its republics (Association of Gerontological Societies, 1982: 49–61). Yet despite a clearer picture of the hardships faced by the elderly and of the policy shortcomings, aging remained a marginal concern for policymakers. One reason may have been ideological: the issue of old age conflicted with communist ideology's focus on class struggle and the unilinear narrative of modernization and

development dominant in Yugoslavia. Socialism was built on hopes for youth, not concerns for the aged. Furthermore, public discourse was shaped by urban interests, and the rural population—where elderly problems were most acute—was often overlooked or dismissed by elites.

Vida Tomšić, member of the presidency of SR Slovenia and a prominent former partisan and leader of the Women's Antifascist Front of Yugoslavia, offered a revealing example of these ideological blinders in her lengthy address to the Second Gerontological Congress in Ljubljana in 1982 (Tomšić, 1982). Her speech framed the elderly's problems within broad global concerns, lamenting the growing gap between rich and poor nations and emphasizing the non-aligned movement's achievements. While acknowledging that elderly issues transcended health, social, and humanitarian dimensions, Tomšić avoided concrete solutions, instead framing aging as a class issue resolvable only within the "inalienable right of every working person and citizen to self-government," a right retained into old age. She asserted: "One of the fundamental truths of gerontology is the fact that it cannot be socially neutral. Its content is mostly determined by the aims and values of a certain society, the relations toward other people in general, and particularly toward elderly people" (ibid., 15–16). Rather than addressing the stark problems uncovered by Yugoslav research, Tomšić praised older generations for their wartime and revolutionary contributions, envisioning old and young working together to safeguard the "continuation of the revolution." She argued against early retirement, emphasizing that work provides both livelihood and self-realization enabled by socialist revolution. Her standard message advocated socializing household and care duties to transform local communities into "natural life communities of self-managers." However, she skirted the practical questions of how this would alleviate elderly problems, especially in depopulated rural areas where few people had been left to form such communities, and who would finance such services—despite the speech's considerable length.

This ideological framing also shaped Yugoslavia's delegation position at the 1982 World Assembly on Ageing. Their statement insisted that aging could not be addressed partially or without "substantial changes to the existing unequal economic and political relations in today's world." They called for global cooperation and mechanisms to implement the New Economic Order, aligning with Yugoslavia's role as a leader among developing countries. Domestically, the delegation emphasized self-management, advocating for the elderly's agency in decision-making and opposing paternalistic approaches. They proudly highlighted Yugoslavia's achievements in providing comprehensive social guarantees and human living conditions for the elderly as expressions of "socialist humanism." While such progressive rhetoric might have impressed international audiences, it contrasted sharply with the lived realities of rural elders grappling with neglect and hardship documented by

Yugoslav researchers. This reality became more difficult towards the end of 1980s, when Yugoslavia faced a severe economic crisis, amplified by the austerity measures introduced upon the urging by the International Monetary Fund in response to the worsening debt position of the Yugoslav government, which had borrowed massively from Western financial institutions (Yarashevich and Karneyeva, 2013; Bojic, 1996). The worsening financial position of the different layers of government affected research as funds dried up, notably towards the end of the decade when hyperinflation kicked in. This was one reason why the time of large-scale, comprehensive surveys came to an end (cf. Manojlović 1991).

Conclusion

In 1991, Petar Manojlović, the tireless advocate for the interests of old people and secretary of the Gerontological Society of Serbia, expressed his frustration with the development of social gerontology in Yugoslavia. According to his account, there had been fifteen major social surveys on the situation of old people—seven conducted by institutions in Serbia and eight by those in other republics. Most of these were carried out in the 1970s, while the 1980s saw little large-scale research on ageing. The studies from that later period tended to focus narrowly on individual municipalities or cities and had, in Manojlović's words, only "modest research ambitions" (1991: 8). This research increasingly concentrated on narrower issues, whereas the surveys from the 1970s had been far more comprehensive. One consequence of this research gap was that public programs and policies aimed at improving the lives of older people often relied on studies conducted two decades earlier, despite profound social changes in the meantime. Given the ongoing demographic ageing and the rise in average life expectancy, Manojlović called for renewed efforts to strengthen research on ageing and old age (ibid.).

Andrew Achenbaum's broader observation about gerontology seems thus applicable to Yugoslavia as well: the country created "islands of knowledge" with little influence on the "development of community-based knowledge" (Achenbaum, 1995: 251–252). The institutional foundations and networks of social gerontology remained fragile, and few researchers outside the social-policy-oriented fields engaged with questions of old age. Notably, demographic scholars rarely addressed ageing: the flagship Yugoslav demography journal, *Stanovništvo*, featured the topic only twice in the 1980s (Penev, Kostić, 1989; Matković, 1989/1990). Meanwhile, in *Gerontološki zbornik*, medical research (geriatrics) gained greater prominence. The decline in research interest during the 1980s mirrored a similar downturn in policy initiatives. For instance, in Macedonia, the issue of old age appeared on the

National Assembly's agenda only three times during the entire decade, despite ongoing demographic ageing.[8]

A second notable trend was a shift in the framing of old age. While the 1970s social surveys tended to define older people as a distinct population (pace Katz) to highlight their needs and criticize state neglect, the 1980s discourse increasingly debated the problems created by the increasing number of old poeple. Berislav Šefer lamented that "when we today speak about old age, we usually speak about it as a problem," even though ageing is a normal biological process (Šefer, 1989: 26). Ageing came to be equated with declining productivity, which negatively impacted economic growth and contributed to increased uncultivated land in rural areas (Avzec, 1981: 68–69; Matković, 1989/1990). The rural population's age pyramid was described as inverted and increasingly unsustainable (e.g., Penev, Kostić, 1984/1985). Authors emphasized the rising dependency ratio—the number of older people relative to those of working age—and questioned the long-term stability of the pension system. Organizations responsible for old-age pensions indeed faced growing liquidity problems and resorted to short-term bank loans and increased contribution rates to meet their obligations (Posrkača, 1989: 129). Posrkača also noted that the "adverse relationship between the number of pensioners and the number of active insurance holders is continuing to worsen" (ibid., 131). He raised serious doubts about the structural sustainability of the Yugoslav pension system, pointing out that on average, people retired three years before the official retirement age and pension entitlements had become quite generous—by 1987, the average old-age pension amounted to 90% of the average personal income (ibid., 135; see also Ruzica, 1992), even though its worth in U.S. dollars was minimal.

Yugoslavia was a country full of contradictions—one of which was the persistence of social problems among older people despite the impressive expansion of public welfare. Our detailed knowledge of these issues is itself paradoxical: while Yugoslavia remained a communist one-party state with restrictions on academic freedom, the government actively commissioned and funded research into social problems—even when these studies exposed the gap between official promises and lived realities. The government hoped this research would help address and resolve underlying social issues. Yet this hope was ultimately futile, as Yugoslavia's economy plunged into a deep and prolonged crisis during the 1980s, drastically limiting the capacity of public institutions to improve welfare and reducing funding for research. Widespread decentralization and the proliferation of self-managed organizations further complicated matters by diffusing responsibility and rendering systemic solutions nearly impossible.

[8] Arhiv na Makedonija, f. 158 (Narodno sobranie).

The precarious situation of older people in rural areas exemplified the general neglect of villages and agriculture by the communist regime. The Yugoslav model of social protection was clearly linked with paid work in the social sector and therefore favoured urban places. It neglected the fact that large parts of the country, and especially its so-called underdeveloped south, remained rural in nature. The growing regional disparities were clearly connected with this fundamental feature of the Yugoslav welfare system—for example, in 1988 the average pension in more industrialized and urbanized Slovenia was more than twice than in more rural Kosovo and Macedonia (Posrkača, 1989: 137). The decline of comprehensive sociological research on old age during the 1980s can also be interpreted as reflecting a diminishing governmental interest in fully understanding these issue – and as a result of a lack of research funds. Public policy making and scientific knowledge proved incommensurable, and the hopes of prominent sociologists that their work might have a direct policy impact turned out to be too optimistic.

Soon, the social question was overshadowed by the national one. While there is no evidence that any of the socio-gerontological researchers themselves adopted nationalist positions, many prominent social scientists did (Lazić, 1982: 92–93). This had profound effects on Yugoslav social sciences: they became increasingly disconnected from international trends, lost interest in social problems, or reframed those issues purely through ethnic and nationalist lenses. In such an environment, research focused 'only' on how various groups actually lived had little chance of receiving public attention or state funding (see Brunnbauer, 2024). The marginalization of social issues has had lasting consequences—explanations for the break-up of Yugoslavia have tended to emphasize ethnic conflict, while social inequality remained largely neglected until recently. Only in the last decade have historians begun to reengage with questions of social inequality in Yugoslavia (Archer, Duda, Stubbs, 2016).

This also means that historians—including the author of this article—have started to rediscover the rich contemporaneous literature on social inequality, including on older people, which had fallen into oblivion for almost thirty years. Institutions that once sponsored large-scale surveys often no longer exist, and their archives are lost or neglected. Even where these institutions still function, they are often unaware of their own history of exploring social problems. The author personally encountered this when visiting such institutions in Skopje in 2024. Similarly, during research in Belgrade in 2023, the author was unable to locate one of the earliest major works on the situation of old people in Yugoslavia (Institut za socijalnu politiku, 1970a) in any of the Belgrade libraries; it was only thanks to an interlibrary loan from the Royal Danish Library that the publication was obtained. This is the perverse effect of nationalism: it first transformed social dissatisfaction into ethnic resentment, then fostered historical narratives oblivious to social marginalization—

further reinforced by the destruction of archives and the marginalization of knowledge caused by the wars ignited by nationalist conflicts.

Acknowledgements

Research for this paper was funded by the Volkswagen Foundation, through their project grant "Transforming Anxieties of Ageing in Southeastern Europe. Political, Social, and Cultural Narratives of Demographic Change". The project is jointly conducted by Leibniz Institute for East and Southeast European Studies (Regensburg), University of Graz, University of Sofia, and the Demographic Research Center of the Hungarian Statistical Office. I also want to acknowledge the support by the project Retlami-SEE (Enhancing Capacities for Quality and Impactful Research on Transformations, Labour and Migration in Southeast-Europe), which is funded by the European Union and led by the Faculty of Political Sciences, University of Banja Luka.

I want to thank Daniela Koleva, Rory Archer, Saša Nedeljković, Kathleen Beger, and the anonymous reviewers for their comments on earlier versions of the paper. I am grateful to Maja Gerovska Mitev and the employees of the Institute for Social Activities (*Zavod za sotsialni dejnosti*) in Skopje for providing me publications on old age from the Socialist Republic of Macedonia and Saša Nedeljković for tracing down some documents in the Archive of Yugoslavia in Belgrade.

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