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VOLUME XLVIII (2). CONTENTS

<i>Petar Parushev</i>	On the Eve of the Alliance Breakdown: Bulgaria at the End of the First Balkan War	7
<i>Gita Yovcheva</i>	The Construction of Bulgarian Orthodox Churches in Romania 1856 – 1878	13
<i>Diana Papoyan</i>	The Armenian Question in the 1890s and Russian Politics (1894 – 1897) Part One	17
<i>Diana Papoyan</i>	The Armenian Question in the 1890s and Russian Politics (1894 – 1897) Part Two	24
<i>Penka Peeva</i>	Great Britain and the Agadir Crisis	31
<i>Margarita Terzieva, Monika Farkas Baráthi</i>	Bulgarian Schools in Hungary (1918-1944)	38
<i>Elena Dicheva</i>	The Formation of Information Culture and Security for the Use of ICT by Adolescents through the Interaction of Educational and Family Environment	41
<i>Bilyana Velikova-Tzonkova Maria Dishkova</i>	Clinical Social Work - Theoretical Aspects	46
<i>Stoyanka Petkova - Georgieva</i>	Methods of Comparison of Economic Risk Management Assessment	53
<i>Stoyan Tranev, Velichka Traneva</i>	Retrospective Analysis of the Assignment Problem under Uncertainty	59
<i>Nikolay Milev</i>	Circular Economy Business Models as a Sustainable Competitive Advantage	65
<i>Nikolay Milev, Lyuba Zheleva</i>	Model for Determining the Impact of the European Funding of Bulgarian Municipalities on the Main Elements of Foreign Direct Investment Process	72
<i>Zlatina Karadzhova</i>	Trends and Challenges to the Restaurant Business in Bulgaria in the Context of Health Style of Life	78
<i>Varvara Pancheva, Valentin Vasilev</i>	Innovative Approaches and Modern Methods in Training to Improve the Quality of Health Care for Diabetes	85

ON THE EVE OF THE ALLIANCE BREAKDOWN: BULGARIA AT THE END OF THE FIRST BALKAN WAR

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ABSTRACT

In the middle of 1913, the countries of the Balkan Union, which had fought eight centuries ago against their centuries-old oppressor, the Ottoman Empire, inflicted military defeat on all fronts at the threshold of war. Territorial claims between Bulgaria, Serbia and Greece, unsettled by the Union treaties, make the peace, achieved in London in May 1913, inapplicable. The time before its signing was marked by various provocations and clashes between the Bulgarian, Greek and Serbian troops and clearly shows the growing conflict between the Allies.

This study sheds additional light on the relations between the Balkan allies, the status of the Bulgarian army and the militant perceptions of some senior officers in the general staff. The focus is on the diplomatic moves of the Bulgarian government to reach a peaceful solution to the issues, and the advice of Russian diplomacy to Bulgaria to avoid military conflict with Serbia and Greece.

Documents from the Central State Archives (CSA) have been used as a base of the study.

Key words: *Balkan Union, Serbia, Greece, Bulgaria, Ottoman Empire, Russia, First Balkan War, diplomatic moves, Macedonia;*

INTRODUCTION

The clarification of the policies of the Balkan governments, the course of Russian diplomacy, the actions of the Bulgarian, Greek and Serbian troops in the occupied territories of the Ottoman Empire, as well as the signs of the emerging clash between the Balkan allies, are significant historical problems that are widely represented in the native historiography.

The issues under consideration are a very important part of the broad subject matter of the great diplomatic and military play between the participants in the Balkan Union, as each of them enters into conflict with the Ottoman Empire with a number of territorial issues not resolved by the Union treaties, which become a source of glowing conflicts between Greece, Serbia and Bulgaria.

The present study seeks to shed additional light on how, at the end of the clash with Ottoman Turkey, pending the signing of the peace treaty with Constantinople, controversies erupt between the Allies, leading them to a fratricidal new war in the Balkans.

Many scientific articles, studies, monographs, memoirs are devoted to one or another aspect of these problems. They are covered in a number of individual and collective scientific papers.

When writing this article, archives from the Central State Archives (CSA) were used.

* * *

In the autumn of 1912, as a result of the united forces of the Balkan allies - Bulgaria, Serbia, Greece and Montenegro, the Ottoman Empire lost control of most of its European possessions. The dynamic development of the events in the region became once again a center of the European diplomacy, since the Great Powers had been long involved in the Balkan and Near East affairs.[1] Not less active was the Balkan diplomacy.

The relations between the allies Bulgaria, Serbia, Greece and Montenegro during the war cannot be distinguished as clear, consistent, much less sincere. They gradually evolve into an undiscovered hostility that can be unleashed at any moment [2]. However, the problems of the allocation of the new territories begin practically in the course of their occupation. Serbian troops are increasingly showing their intention not to withdraw from the area in Macedonia, declared "indisputable" under the secret annex to the union treaty with Bulgaria. The contradictions with the Greek troops, exacerbated by the lack of any prior agreement on the newly acquired lands, are

even greater¹. In the spring of 1913, during the second phase of the war, a temporary ceasefire ensued, tensions escalated and open clashes were already struck between Bulgarian and Greek parts on the one hand, and between Bulgarian and Serbs on the other². At the same time, negotiations are ongoing in London to sign the final peace treaty between the countries of the Balkan Union and the Ottoman Empire.

The sentiment of pre-emptive war with the Allies in order to push them out of Macedonia was shared by some of the top military circles in Bulgaria long before the end of the Balkan War. Particularly consistent in this regard is Assistant Commander-in-Chief of the Bulgarian Army Lieutenant General Mikhail Savov.

In an encrypted telegram from April 1, 1913, to the Prime Minister and Minister of Foreign Affairs and Confessions, Ivan Evstratiev Geshov, the general announced the commencement of the transfer to Macedonia of part of the Serbian troops who had recently participated in the siege of Edirne. According to Gen. M. Savov, the Serbian siege artillery would be landed in Kumanovo, located in the "indisputable" zone. "This circumstance leads me to the idea," concludes the Assistant Commander-in-Chief, "that the Serbs are planning to counter forcefully and not empty the conquered Bulgarian cities in Macedonia. Against this background, I think that all means must be used to make peace with Turkey as soon as possible so that we can group our army in time and protect the interests of the homeland". [3]

On April 2 this year, General M. Savov expresses to the tsar and the government his concern that the Bulgarian army could be put in a "desperate situation" and "... to be forced to sac-

rifice the most vital national interests in Macedonia." The Assistant Commander-in-Chief also points out that the only viable way out of this is to be prepared to go to war with our allies and defend the interests of Bulgaria. [4]

On April 10 1913, from the Bulgarian Headquarters in Edirne general M. Savov sends an encrypted telegram to Ivan Evstratiev Geshov. He emphasizes the need for a separate peace with the Ottoman Empire. General M. Savov informed the Prime Minister that, according to the instructions of the Government, he had extended the truce period by 10 days. At the same time, however, he was firm in his view that "such a chronic cessation of hostilities, without being able to proceed immediately with the withdrawal of our troops from the Thracian Theater would have disastrous consequences for the domestic interests". [5]

The general's reasons are as follows: "any effect of our victories during our inaction against the Turkish army will be obliterated and the glorious victories of our army will be gradually obscured." In addition, "Greeks and Serbs will gain more and more time to take a favorable strategic position against us." According to Gen. M. Savov The detention of the Bulgarian army in Edirne Thrace was deliberate in order "to be used by the already allied Serbs and Greeks before peace was made, to offer us their conditions for the partition of Macedonia, and to impose them upon us if we refuse to we accept them, to proceed immediately to the opening of hostilities, until we have focused our army, in order to impose their conditions on us by force of arms". [6]

Further in the encrypted telegram gen. M. Savov becomes very specific in his warnings that such a prospect "would be the most dangerous for us", because in order to focus the whole Bulgarian army on actions against the Serbs and Greeks, it will take at least 40 days - time which will be enough for former allies to capture the "most important geographical locations" in the Kingdom. "The only way out of this extreme disadvantage," concludes the general M. Savov - is to find a means of concluding a separatist peace with Turkey an hour soon, so that we can proceed immediately to the focus of our army and then begin to treat the issue of separation. Any delay in the conclusion of peace may, in the above circumstances, may have fatal consequences and may be irreparable to military operations. [7]

The concerns expressed by the general M. Savov is based on extremely disturbing infor-

¹ Svetas, S. The end of the First Balkan War and the eve of the war between the allies (the Inter-Allied War): the diplomatic actions of Greece and the psychological atmosphere between Bulgarians and Greeks. - In: In Search of the National Ideal 1878–1913. Reports and Announcements from the International Scientific Conference, Blagoevgrad, October 2nd -3rd, 2008 Blagoevgrad, 2009, 416 - 423; Drenkov, I. The Bulgarian-Greek relations in Thessaloniki according to the British Consul General Harry Lamb (December 1912). - In: 100 years since the Balkan Wars. International Science Conference, November 11th, 2013. S., 2015, 100 - 104.

² For more on the Bulgarian-Greek rivalry during the Balkan wars, see. Konstantinova, Yu. Bulgarians and Greeks in the Fight for the Ottoman Heritage. V. Tarnovo, 2014, 198 – 264

mation coming from Macedonia. In a report from the Bulgarian delegate to the headquarters of the Serbian army in Skopje, Major Y. Razsukanov, dated April 3, 1913, details the repression to which the local Bulgarian population was subjected. J. Razsukanov notes that, especially after the capture of Bitola by the Serbian army, Belgrade's policy has become blatantly anti-Bulgarian: "The population began to be quickly hurried, violence and ill-treatment against Bulgarians began. And all "straight Serbs" took the most active part in this holy Serbian affair: both the general, the clerk, the minister, and hauler were competing for more "Bulgarians" to turn into "straight Serbs." The Macedonian stunned; he did not know and now does not know what to do and where this new mischief came from. For the Serbs, there was no other enemy, and now there is none, except a Bulgarian: first a Macedonian and now a Bulgarian from Bulgaria". [8]

The Bulgarian military delegate has no illusions about the true intentions of the Serbian allies: "The obvious preparation of the Serbs for resistance, and even for the occupation of the" undefeated "in the sense of concentrating their units in the Vardar valley, makes clear already the decision that they are Y. Razsukanov gives information about the movement of Serbian military units in Macedonia with a view to preparing them for possible hostilities against Bulgaria. At the same time, the Bulgarian military representative is paying attention to the growing Serbian terror, which puts him in increasing isolation against the local Bulgarians. "It is difficult, if not impossible," Razsukanov notes, "to keep track of the movements of the Serbs now. They do not allow anyone to approach the stations. They do not allow anyone to go outside the settlements; prevent local people from going beyond borders; they are arrested and charged with espionage for the slightest doubt. People are scared and I will find it very difficult and difficult to find trusted persons". [9]

In conclusion, Y. Razsukanov summarizes that it seems that "we will have to deal with Serbia not as an ally: that at least one peaceful expulsion (emphasized in the text, P.P.) will be needed by Macedonia. The sooner it becomes, the more successful it can be: both politically and purely military". [10]

Thus, in essence, the Bulgarian representative at the Serbian Headquarters solidifies with the opinion of the Assistant Commander-in-Chief for the Preventive War against the Allies. Meanwhile, by Edirne general M. Savov continues to

send disturbing telegrams to the Council of Ministers. On April 13, he described in detail the aggressive behavior of the Allies. He quotes a telegram from the Macedonian military governor general. Vulkov, according to which Greek and Serbian military units are constantly moving forward and occupying key sites in Thessaloniki, Gevgelija and Kukush region, trying to isolate the Bulgarian troops. "In doing so, I consider it a duty to add," said M. Savov, "that if the Greeks were allowed to move in this way, we would soon be cut off from Kukush and forced to clean it up". [11]

On 21 April, he again sent a similar telegram stating that, according to the Macedonian Military Governorate, the Serb authorities had demanded lists of all 20- to 25-year-old villages in Gevgelija, and that the Serbian troops had sworn that "at no cost they will not give us up a span of land from the blood they have taken." [11]

The militant moods of the generality are shared by some Bulgarian diplomats. The Minister Plenipotentiary of Rome, Dimitar Rizov, insists on a firm and uncompromising approach to relations with the Allies. In an encrypted telegram from April 25, 1913, to the Prime Minister, he announced that he knew, according to a reliable source, that the Russian ambassador to Belgrade, Nikolai Hartwig, was secretly encouraging Belgrade to push for a review of the union treaty with Bulgaria. D. Rizov notes that N. Hartwig should know that "on this issue, Bulgaria is definitively and irrevocably determined not to enter into any negotiations with Serbia, neither verbally nor in writing, nor even to talk". It would be desirable for Russian Foreign Minister Sergei Sazonov to also be clearly aware of the Bulgarian position. D. Rizov directly calls on Bulgaria to resolve the military knot of contradictions created in its relations with the Allies. Instead of revising the treaty, he calls on Ivan Evstr. Geshov and the government to "end all accounts with the Serbs and Greeks right now, by pushing the former behind the Shar Mountain and the latter behind the Bistritsa River, thus finally crystallizing our borders. It is like, we can no longer go with them any further, and we will hardly avoid a war with them, if not now, a little later". [12]

Meanwhile, the announcements of General M. Savov about the condition of the Bulgarian army in Thrace became more and more alarming. In an encrypted telegram dated April 27, 1913, to King Ferdinand and to Prime Minister Ivan Evstr. Geshov, the general warned that inaction

led to a decline in his fighting spirit and discipline.[13]

On April 30th this year, General M. Savov again informed the tsar and the prime minister that the "situation of expectance" had a bad effect on the fighting spirit, and he was forced to order the divisions to come to camps with artillery, where they would conduct military training, marching training, conversations and entertainment, and the suspicious agitators - to be put to trial, with the purpose of "tightening the discipline." [14]

At the same time, Constantinople is undertaking intensive preparations for the renewal of the military campaign. The Ottoman troops were building new fortifications and adding more cannons, filling their units with recruits. "All this," concludes the general M. Savov - taken together, portrays the situation as too serious and if measures are not taken in a timely manner, I am afraid that we will not bring any catastrophe to the country. "He again insisted on concluding peace with the Ottoman Empire as soon as possible, because "the protraction could put the army and our country in a deadlock". [15]

At the beginning of May 1913, just days before the signing of the Peace Treaty of London, the reasoning of General M. Savov is quite specific about the future war with the Allies. The assistant commander-in-chief no longer questions the military resolution of the controversy with Serbs and Greeks.

In an encrypted telegram of May 6, sent from Edirne to Ivan Evst. Geshov, General M. Savov is convinced of the categorical superiority of the Bulgarian army over the armies of the Allies. He reports that he has taken steps to protect Sofia from a possible Serbian attack. The Assistant Commander-in-Chief advises Ivan Evstr. Geshov "have the courage and fortitude in negotiating with the Allies, bearing in mind that their armies are ones that we will easily break and destroy. And that perhaps there is no better opportunity for us to do this now that they themselves challenge us. "The only pre-requisite is the immediate settlement of relations with Turkey. From now on, "we will certainly have the upper hand over our allies in every respect. The morale of our troops, when it comes to fighting Greeks and Serbs, is very high and everything burns with a desire to avenge their misbehavior. "In this regard, General M. Savov calls on the Council of Ministers to fully understand the issue of staffing and equipping the Bulgarian army with a view to its future actions at the western border. [16]

The expectations for separatist peace with the Ottoman Empire, shared by some military and diplomatic circles, was quickly cooled by official Petersburg. On May 8, 1913, Ivan Evstr. Geshov sends an encrypted telegram to the Bulgarian Legation in St. Petersburg, stating that a Russian warning has been received (via Ambassador to Sofia Neklyudov), advising Bulgaria not to conclude and sign a separate bilateral peace treaty with the Ottoman Empire. Otherwise, the Bulgarians will "take over themselves the breakup of the union and then they cannot count on Serbia's respect for their union treaty". [17]

In response to the telegram of S. Sazonov Ivan Evst. Geshov instructs the Bulgarian Legation to explain that Sofia's rush to sign peace is quite natural and dictated mainly by the desire of the hundreds of thousands who have been mobilized to return to their homes: "After terrible battles and losses, we are now in terrible inaction, which not only uselessly inflicts heavy casualties on the victims, but also severely tortures and torments our soldiers and their families. Thousands of the latter are starving as a result of their owners' eight-month absence. " The opposition in Bulgaria has taken advantage of this position by staging public opinion against Russia, accusing it that "it has not allowed us to go to Constantinople to sign peace there." accuse our allies that they are delaying negotiations, that they are the reason for delaying the signing of peace. S. Sazonov will understand the dangerous consequences that this agitation can bring. "Appeal vigorously to him," concludes Ivan Evst. Geshov - either to get the Allies to sign peace immediately or to agree that we can no longer wait and that our delegates in London will do well to set our allies a deadline before which the preliminary peace treaty must signed, even without them". [18]

On the eve of the signing of the Peace of London, General M. Savov becomes more and more firm in his conviction that the only way out of the crisis with the Allies is war. The plan he proposes remains the same - concluding an immediate separatist peace with Ottoman Turkey, transferring troops to the west, and preparing for war with the Serbs and Greeks. The encrypted telegram to Ivan Evst. Geshov of May 10, 1913. Gen. M. Savov states these views. He insists on the transfer to the West, to Macedonia, of all Bulgarian troops stationed in Thrace. This must be preceded by the conclusion of a separatist peace, which must be done quickly, "so that we can concentrate our troops more quickly where

the highest national interests call for them. Any delay in the conclusion of peace will be catastrophic for Bulgaria". [19]

On the occasion of the recent, bloody clashes between Bulgarian and Greek troops in the region of the Angista River, General M. Savov writes that he shares the opinion of Prime Minister Ivan Evstr. Geshov, "that this could be a deliberate provocation" aimed at provoking a larger-scale confrontation between Bulgarians and Greeks and Serbs. At the same time, he is adamant that he should not yield to the constant onset of the Greeks. "All this shows," M. Savov writes, "that the way out of this situation is one: peace with Turkey rather, so that we can focus our troops more. Any delay is detrimental to us and will put the command in absolute inability to fulfill its duty". [20]

In response to calls from General M. Savov, on May 11, 1913, sent the Prime Minister his opinion to the Government in an encrypted telegram. It details the cabinet's position and outlines the dangers of a separatist agreement with Turkey. The Prime Minister stated that "our best friends have warned us that signing a separate peace will be considered by our allies as a violation of both treaties, since both explicitly state that a separate peace cannot be signed ... And when we give such an excuse to our allies, they are capable of declaring our entire treaties invalid and causing us great mischief. " Ivan Evstr. Geshov insists that the Bulgarian military command should make every effort to stop the incidents with the Greeks, as well as the necessity to reach an agreement with them on maintaining the status quo and defining a demarcation line. [21]

Two days later Ivan Evstr. Geshov again sends an encrypted telegram to General M. Savov urging to refrain from the use of weapons against the Greek troops. The Prime Minister's calls are in no way to attack the positions of the Greek units, although as they move forward they are constantly giving rise to new conflicts. "Once again, I would like to pay the most serious attention to the devastating consequences for the homeland in today's unprepared situation of such attacks. The latter will lead to war with Greece, and according to the best-known diplomat, Serbia will not attack us here unless we provoke a war with Greece. I assure you most emphatically that the current government will not agree to be involved in a second war unless it is as sophisticated and prepared as it should be. It will be a great crime to do otherwise in this case. "That is why Ivan Evstr. Geshov again insists, as in his

previous telegram, to settle all disputed issues with the Greeks by designating either a demarcation line or a neutral zone. [22]

The answer sent by General M. Savov is coming the next day. In a telegram from Edirne, sent on 14 May 1913, the general made it clear that a firm and decisive response to Greek provocations was needed. Moreover, the Greek troops are trying to disrupt the communications and supply of the Bulgarian army by damaging the telegraph and railway communications. As a major argument, the General points out that a resolute opposition to the Greeks would be of great educational and moral importance to the Bulgarian army and would help to strengthen its discipline. [23]

"You have to bear in mind," continues M. Savov, "that an army cannot be left permanently, I do not know for what reasons, it can be exposed to the most humiliating insults and insults, as is the case with the breaking of our order of bravery on the insignia and uniform of a district chief, such as the countless cases of disarming and arresting our soldiers and officers by the Greeks, without badly affecting their morals and discipline, and without undermining the prestige of their chief. [24].

Gen. M. Savov dismisses as unfounded the suggestion that the Headquarters "almost wants to involve the government in a war with our former allies." Measures taken to protect the capital from a possible Serbian attack were taken at the insistence of the Council of Ministers, which resulted in the concentration of Bulgarian troops in Macedonia and on the western borders against Serbia. Also, at the request of the government, command began to concentrate troops in Macedonia and against the Greeks, who "with their constant reckless invasions had reached the right bank of the Angista River".[25]

The general also points out that the latest large-scale armed conflict was provoked precisely by "the movement of the Greeks along the left bank of this river in order to capture the railway and its bridges. He further points out that he warned the government by asking the question too clearly - does the government want to let the Greeks occupy the railway as well ?, and concludes: "I did not get any answer to my question, then what should I do? It is all too natural for me to take steps to disguise the railroad". [26]

On the battle by Angista river, provoked by the attempt of the Greek troops to control this strategic railway, General M Savov is very clear: "The Greeks attacked us to seize it - our counter-

attacked them to prevent them from doing this - then who is to blame? Even less so is the government justified in making allusions to it, given the fact that I have spoken openly that now is the right time for a war with Serbia and Greece to secure once and for all the Balkan Peninsula, because this is my personal opinion, which I still maintain with greater confidence, because I believe that from a military point of view, our situation is not only not critical, but on the contrary, after 4-5 days, when we will finish the concentration of parts which for now we will be able to focus on Serbia, it will be very good so that we can take on the fight, with all the chances of success, against both the Serbs and the Greeks. However, this is a purely military point of view, which, if I speak, cannot serve as a basis for the government to suggest that I seek to draw it into a war because [it] holds all, and the thinnest strands of politics in your hands". [27]

Just three days after this telegram to the Assistant Commander-in-Chief, in the face of unresolved problems and ever-increasing tensions between the Allies, the London Peace Treaty was signed, ending the Balkan War. The treaty defines the borders between the countries of the Balkan Union and the Ottoman Empire, but in no way commits itself to the final distribution of the lands reclaimed by the Balkan allies. Formally, Bulgaria is at the height of its military might, with a wartime territory that, despite the non-accession of most of Macedonia, exceeds even the bravest initial expectations. On the same day Ivan Evstr. Geshov, anticipating the catastrophe and convinced that he could not, in any way, influence the events in a favorable for Bulgaria sense, resigns. A month later, the idea of General Mikhail Savov for simultaneously attacking Greek and Serbian positions in Macedonia, "confirmed" by the oral orders of Supreme Commander King Ferdinand, will receive its realization, leading the country to the Second Balkan (Inter-Allied) War and the first national catastrophe.

At the end of the Balkan War, there was a serious discrepancy between the political and military leadership on the strategy that Bulgaria should follow. The unforeseen and quite unexpected prolongation of the war and the tightening of the peace talks in London objectively puts the Bulgarian state and army in an increasingly disadvantageous position, since the Eastern Thracian front is in fact the only land front between the

forces of the Balkan Union and the Ottoman Empire. The Coalition Cabinet of Ivan Geshov, although aware of the policies of Serbs and Greeks, adheres to the line of avoiding any armed clashes with the Allies. The compromised, hesitant and even condescending government policy is something that the high-level command does not share. The army leadership believes that decisive action is needed to push Serbian and Greek troops out of Macedonia, and even that the lucky and long-awaited moment has come. It is therefore a matter of time before the existing contradiction develops in one direction or another, and it does not come late, with the fatal step taken on 16th June 1913.

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**THE CONSTRUCTION OF BULGARIAN ORTHODOX CHURCHES IN ROMANIA
1856 – 1878**

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ABSTRACT

This paper investigates the efforts of the Bulgarian diaspora in Romania to build its own Orthodox churches in Romania in the period from 1856 to 1878.

Based on rich documentary sources the author argues that these newly created spiritual centres had a decisive role for the preservation and the development of the Bulgarian identity and nationality at the territory of other countries. In her research the author has used officially published sources and works of Bulgarian and foreign authors.

Key words: *Orthodox churches, Bulgarian diaspora, migrants*

INTRODUCTION

The fall of Bulgaria under Ottoman rule had devastating consequences for the Bulgarian people and led to the wiping out of the Bulgarian cultural elite, the Bulgarian culture and the independent Bulgarian church. It triggered the long process of emigration of the Bulgarian population to neighbor territories. A part of these is the Moldavian principality. In the beginning of XV century, immediately after the start of the Liberation movement, the Bulgarians were forced to leave their lands. One may suggest that part of this population migrated to Budzaka, which from the end of XIV century until the beginning of the XVI century was a part of the Moldavian principality. The region was well – known under the name “Ongal” and it included the mouths of the rivers Danube and Dnestar and until 1812 also the region of Bessarabia. The migration continued even at later times when these areas were conquered by the Ottoman Turks. [13 – 9-10]

The Russo-Turkish wars from the second half of the XVIII century and the beginning of the XIX century gave a new boost to the migrants’ movement. A series of manifests issued by the Russian tsar invited foreigners to come and start a new living in Russia and granted them certain rights and privileges. The first mass migration to Bessarabia was related to the Russo-Turkish from 1806 -1812. Bessarabia became part of the Russian empire after this war. Prominent figures of the Bulgarian Liberation movement such as Sophroniy Vrachanski considered that the

creation of an autonomous formation beyond the borders of the Bulgarian lands was possible and supported the mass migration of Bulgarians to the Danube principalities and Budzaka. [13 – 11-13]

The next military conflict between Russia and the Ottoman Empire was in 1828-1829 and it led to the second mass migration of Bulgarian population into the principalities of Wallachia and Moldova, as well to Bessarabia. According to Ivan Meshcheryuk, their number amounted to 86 700 and according to Stephan Doynov - to 130 000 or 131 000. [13 – 19-20].

The Crimean war (1853 -1856) triggered another wave of migrating Bulgarians. The military conflict was a major failure for Russia and it spread its negative impact over the fate of the Bulgarian colonies. According to the Paris Peace Treaty from 18/30 March 1856, Turkey seized vast territories from Bessarabia and the mouth of the River Danube. Over 5000 km² Russian territory with approximately 130 000 people, including a lot of Bulgarians, went under foreign rule. [14 – 124-125] Russia ceded to the Moldavian principality (under the suzerainty of the High Port) a part from the territory of the Bessarabia region (near the Lower Danube and the Lower Priprutie). Forty colonies created by “over-Danube” migrants including their administrative centre Bolgrad were situated there. 43 colonies remained in the Russian part of the Bessarabian region. According to the data provided by Ivan Antsupov, the Bulgarians amounted to 49 400 people in 1858. Hence, from 1856 until 1878 the history of the

Bessarabian Bulgarians developed in the frames of two states. [13 – 29] This affected not only their social-economic and political situation, but also their spiritual development, since the administrative and territorial unity established during the first half of the XIX century was now distorted. [13 – 29]

The works “The Bulgarians in Ukraine and Moldova. Past and present” by Ivan Grek and Nikolay Chervenkov, ”The Bulgarians in Ukraine and Moldova during the Renaissance 1751-1878“ by Stephan Doynov, as well a number of other researches, elaborated in details over the state of the Bulgarian diaspora in Ukraine and Moldova. The historical fate of the diaspora, which remained outside the territory of Romania after the Crimean war and its efforts to build independent Bulgarian churches was not that well reflected in the above mentions works.

In this connection, the current study aims to follow-up the efforts of the Bulgarian diaspora in Romania to build its own Orthodox churches in the period 1856-1787 and to prove their decisive role for the preservation and the development of the Bulgarian identity in the territory of other countries. For this purpose the author used officially published sources and works of Bulgarian and foreign historiography.

SUMMARY

The Orthodox Church played a decisive role in the spiritual life of the Bulgarian diaspora. Being located in the old Bulgarian lands, the Bulgarian population had limited opportunities to follow its religious rites due to the lack of Orthodox temples and clergy in number of settlements and due to the oppression by the Muslim authorities. By migrating to the Christian regions, the Bulgarians had the full freedom to profess their faith. In this way the migrants to the Moldavian principality managed to develop their spiritual life, based as on the Bulgarian centuries-long cultural experience and folk traditions and also on the new conditions including the cultural in the different regions of their settlements.

One of the important moments for the Bulgarian settlement in the new lands is the construction of religious buildings – homes for praying, churches, cathedrals, monasteries.

Several years after the end of the Crimean war 1853 -1856, the Bulgarians in Galați were granted a permission by Knyaz Alexandar Yoanovich I Kuza to erect their “*own Bulgarian people’s church*” on the place they had

previously bought, in which the services to be held in the “*Slavic language*”. It was also foreseen that “*a new Bulgarian people’s school*” would be built to the very same church. The Board of Trustees was elected on 27 July 1861 in the following order: Antakya Yordakyuv – to follow up the construction of the church and the school, Panteleymon Avramov – to gather financial means for the construction, Mihail Avramovich – treasurer. The three trustees were from the town of Svishtov in Bulgaria and they accepted “*to serve this pious deed pro bono*” . The initiator and the inspirer of the Bulgarians to build this church and school was the archbishop Maxim Raykovich from Dryanovo, the region of Tarnovo in Bulgaria, “*who started Slavic-Bulgarian reading in Galați*”. [2 – 79-80] The same person, true to his patriotic duty, donated 500 Austrian golden coins to the construction of the church and the school. [1 – 81] In his testament dated from 13 January 1873 Maxim Raykovich pointed out that all “*silver and gold-plated items, books, clothes and other items for sale .. to be sold...*”and the money received for them to be used for the already built Bulgarian church “*St Panteleymon*” in Galați. His dying wish was to be buried in the same church “*if it would be allowed by the local authorities*”. [3 – 169-170]

Two years after the start of the initiative for building of a church in Galați, Bulgarian patriots from Bucharest commenced actions in the same direction. Silvester Panov’s testament from 26 June 1863, born in Gabrovo, lived and worked in Bucharest, is an evidence for the intentions of the Bulgarians in Bucharest to open an own church in the Filaret district in Bucharest. According to Art. 7 of the document „*to the Bulgarian church, which is to be erected here, in the capital of Filaret, I leave 5000 grossha (small coins)*”. [3 – 85-86] Five years later, in May 1868, from a letter of an infamous Bulgarian cleric to a Russian archbishop, it became clear that the idea for building of a Bulgarian church in the Romanian capital was not abandoned. “*Our Slav-Bulgarians have the intention to erect an Orthodox church in which the service shall be held in Slavic and therefore I feel the need to supply myself with 1 (one) set of church service books*”. For this purpose, the Bulgarian cleric turned for help to the high Russian cleric, with the request to receive the needed clerical books. [5 – 108-109]

The political organization “*Epitropia*” was officially established in December 1853, still

during the Crimean war, by the initiative of Hristo and Evlogi Georgievi, Hristo Mustakov, Constantine Chokan, Mihail Kifalov and other prominent Bulgarian emigrants in Bucharest. Its goal was to help gathering money for volunteer military groups that would become part of the active Russian army. The "Epitropia" was more popular in the Bulgarian history under the name "The Virtuous Company" or "The Committee of the Elders". It united the interests of the rich Bulgarian merchants and entrepreneurs living in Wallachia. The figures in "Epitropia" were Russophiles. After the Crimean war they developed active charities. [16 – 230]

On 14 July 1868 the famous Bulgarian patriot Hristo Georgiev sent a letter to the "Virtuous Company" in Bucharest. From the content of this letter it became clear that he was ready to remise Mataka Maresha's former house, already owned by him. The lack of a building, which until this moment was the main obstacle and impeded the opening of the Bulgarian church and school in Bucharest, was gone. The building, located in "Vergului" street (later 16 "Kalarashilor" street) was bought by the "Virtuous Company". [10 – 112-113]

According to Art.1 from the Statute [8 – 123-125] of the Bulgarian church and school in Bucharest, approved on 21 January 1869 they *"are and remain establishments, dependent on this Company"*. It was foreseen that the church will exist as a chapel until the moment when enough money will be gathered to build a new structure, and the service shall be held in Slavic and Old-Bulgarian language (Art. 2). The management of the church and the school shall be implemented by an Epitropy (Board of Trustees) with three members (Art. 11). The managers (the epitropes) are elected for two years with majority of the members present. They shall be Bulgarians and Orthodox Christians (Art. 12) The epitropy will be under the direct supervision of the Board of Trustees of the Virtuous Company and will be held accountable for its actions (Art. 13). [9 – 123-124]

The Bulgarian church (chapel) was formally opened on 11 May 1869 – the day of St St Cyril and Methodius – the patrons of the church and the school. [9 – 125] An accommodation for the archbishop Panaret Rashev was established on the upper floor of the building. [10 – 112-113]

On 8 August 1869 the Board of Trustees of the Bulgarian church and school in Bucharest filed a request to the Ministry of Faith and the

Education of Romania for opening of a Bulgarian primary school in the town in the beginning of the 1869-1870 school year. *"According to the statute, the education will be free of charge, will be led in Bulgarian and according to the program of the state schools, and the Romanian language will be compulsory"*. [11 – 139-140] The request was signed by D.A.Solakolu, archbishop Panaret Rashev, Nikolae Hristo, Paskal Katrndjiev, Ivan Grudov and other representatives of the Bulgarian colony in Bucharest. This was namely the last document requesting the legitimatization of the Bulgarian school in Bucharest. [11 – 140] The school started functioning in September of the same year. [9 – 125]

The content of the notes in the "kondika" (the book) of the Bulgarian church and school Board of Trustees in Bucharest from 1872 to 1874 reveals the major role of this important spiritual center. Becoming the unifying center of all Bulgarians there, the Bulgarian church headed by archbishop Panaret Rashev developed serious charity activities. [6 – 175]

Several years later, one obtained information about the celebration of St.St. Cyril & Methodius day by the Bulgarian community in Turnu Magurele, from a short dispatch to the "Independence" newspaper on 16 May 1874. The church service was led in both Romanian and Slavic, and the consecration of water - only in Slavic, because father Rade from Svishtov came especially for this purpose. During the festivities the people gathered at the venue sent special greeting telegrams to the newly elected Bulgarian Holy Synod, to the prince of Monte Negro and to the Serbian Ministry of Interior. [15 – 184] *"We would like to cordially thank the Bulgarian company in Turnu Magurele that it remembered its Serbian brothers in this day of celebration. May this day of the Slavic Enlightenment be an eternal reminder for the brothers' love between the Serbians and the Bulgarians! Long live the Bulgarian people!"* The telegram was signed by Serbia's Minister of Interior. The sixth telegram was sent to "Slavyanska beseda" newspaper in Bruin, *"in which we cordially congratulated our Czech brothers"* is to be read in the dispatch. [7 – 180]

CONCLUSION

The Bulgarian diaspora in Romania emerged and formed in two ways – by migration to Romanian territory or by annexing of lands,

populated with Bulgarians. The migration movement was massive in the end of the XVIII and the first half of the XIX century when the most significant Bulgarian colonies formed in the territories of the Wallachian and the Moldavian principalities. After the Crimean war, in the course of several years there were new migration movements, connected with the transition of a part from Bessarabia to the Moldavian principality.

The Bulgarians who had left in these territories, developed diverse economic, political and cultural activities. The building of Bulgarian Orthodox churches is on one hand part of their contribution to the new fatherland and on the other - to the Bulgarian national liberation movement. By introducing of church services in Slavic and the introducing of the Bulgarian language in the newly opened Bulgarian schools they became not only an uniting center for all Bulgarians, but also played an important role in the fight for national self-determination and protection of the minority rights of our migrants. They minimized all attempts for denationalization and assimilation of the Bulgarians which is an undoubted contribution for the protection and the preservation of the integrity and the uniqueness of the Bulgarian ethnicity.

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**THE ARMENIAN QUESTION IN THE 1890s AND RUSSIAN POLITICS
(1894 – 1897)
PART ONE**

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ABSTRACT

The Armenian Question, one of the most complex national issues in the Ottoman Empire, had developed into a serious diplomatic problem since the late nineteenth century. The great powers interfered in its resolution, driven by their own political and economic interests in the region. England, France and Russia were primarily involved in the Armenian crisis of 1894 – 1897, which found expression in massacres and the Turkish government's failure to fulfill its reform obligations. Russia was the most important factor in resolving the Armenian Question. However, tsarist policy was generally volatile, inconsistent, and indecisive, as was its overall policy on the Eastern Question, according to some authors. This issue lacked a clear government agenda; there were numerous and different perceptions among the political circles of the country about the nature of Russian interests in Armenia. For these reasons, the tsarist government did not want to exacerbate the situation in the Ottoman Empire and was very cautious and reserved about the issue of introducing reforms in the Armenian vilayets, according to Art. 61 of the Berlin Peace Treaty. There were two main goals, which Petersburg pursued in the Near East during the period under review. The first one was the preservation of the integrity of the Ottoman Empire and the second one - maintenance of the Straits regime. In this sense, the activation of the Armenian Question was contrary to the interests of Russia, which is why it manifested a deliberately passive policy against the anti-Armenian actions of Sultan Abdul Hamid II.

Key words: *Armenian Question, Russian diplomacy, English diplomacy, Ottoman Empire, Abdul Hamid's politics*

INTRODUCTION

The 1890s mark one of the culminant points in the history of the Armenian question. During this period, the situation of the Armenians in the Ottoman Empire, as well as the policies of the great powers towards them, differed significantly from the previous and subsequent decades. The reasons for this change are diverse – they relate both to the overall development of the Eastern Question, to the development of the Armenian national liberation movement and the attitude of the Ottoman authorities to it, as well as to the specific political goals pursued by each of the European countries in the Near East during the period.

Until the Russo-Turkish War of 1877 – 1878, the Armenian Question was a domestic political problem of the Sublime Porte. After the 1878 Congress of Berlin, however, it grew into a problem of international importance, in the resolution of which all the great powers intervened. From then on, the Armenian national

issue entered into the realm of contradictions between the great powers and became part of the great Eastern question.

As Russian diplomacy was the initiator of the inclusion of clauses in the San Stefano and Berlin peace treaties guaranteeing the introduction of reforms in the Ottoman provinces populated with Armenians, the Armenians expected that Petersburg would commit to improving their living conditions. This hope was also confirmed by previous military diplomatic moves of the tsarist government since the early 19th century, which resulted in Eastern Armenia [1] being liberated from Persia and annexed to Russia. However, after the Congress of Berlin, there was a change in the Russian policy towards the Armenians, which, until almost the first decade of the 20th century, kept the tsarist government in a neutral and sometimes negative position on the Armenian Question.

This article aims to give an overview of the reasons why Russia, a traditional defender of the rights of Christian peoples in the Ottoman

Empire, showed a lack of interest in the fate of the Armenians during the repressive policies of Sultan Abdul Hamid II's government from 1894 to 1897.

The events in the 1890s in the Empire have been extensively explored in Armenian as well as in Western European, Russian and American historiography. The research interest is mainly focused on UK policy, which after the Congress of Berlin was the only one active on the Armenian issue, seeking to put under its control the introduction of reforms in the Armenian-populated region. The historians argue that Britain took a close interest in the fate of the Armenian population in the Ottoman Empire, although after the Crimean War Britain followed a policy of "splendid isolation". The Armenian question was the one that challenged her policy of no commitment and marked the beginning of series of events that put an end of her isolation [2].

However, the essence of Russia's policy in the Abdul-Hamid repression is poorly understood and needs a comprehensive and systematic presentation of the problem and the reasons that led to a change in the tsarist foreign policy towards the Armenians in the Caucasus and Asia Minor.

For the proper understanding of Russian policy towards Armenians during the period, in this article we have used primary documentary sources, journalistic materials and historiographical studies. One of the most valuable documentary publications related to the topic of the article is the collection "*Genocide of the Armenians in the Ottoman Empire. Collection of Documents and Materials*", prepared by the Armenian Academy of Sciences in 1966, edited by Prof. Mkrtich Nersisyan. The publication includes numerous documents and materials from Armenian, Russian, Ottoman, German, English, French, American and other sources related to the genocidal policy of the Ottoman Government towards the Armenians. Most of the documents are official diplomatic correspondence, reports and letters between consuls, ambassadors, ministers and other senior officials from European countries, Russia and America. For the preparation of this article have been used the materials of the first part of the compilation on Sultan Abdul Hamid II's repressive policies from 1876 to 1908 [3].

Another important documentary is "*Genocide of the Armenians: Turkey's Responsibility and World Commitments. Documents and*

Comments" [4] published in Moscow in 2002 – 2003 by the Professor of International Law Yuri Barseghov. Of interest to us is the first volume, which includes documents for the period 1876 – 1923, which show the attitude of the world public and the great powers to the actions of the Sultan and the High Porte against the Armenians.

Of great importance is the compilation "*Documents on the Armenian Question*" [5], compiled by the famous Armenian historian Leo (Arakel Babakhanian) in 1915 in Armenian. The collection covers documents for the period 1829 – 1914.

A rich source of information is the series of published *Blue Book* documents, issued annually by the English Government.

Important archival materials related to the topic of the article are also contained in the Russian scientific periodical *Krasny arhiv (Red Archive)* [6].

With regard to material of a journalistic nature, the works of the following writers, contemporaries of the events, will be put into consideration:

- the famous Armenian socio-cultural activist *Alexey Jivelegov* (1875 - 1952), one of the creators and editors of the Russian weekly "Armenian Journal", left a rich historical and journalistic heritage. Of his numerous articles on Armenian topics, of particular interest to us are those in which the author critically analyzes the attitude of Russian Empire to the Armenian Question and to the Armenian people, both in Russia and in Ottoman Turkey [7].

- the Russian writer and journalist *Alexander Amfiteatrov* (1862 – 1938), whose work "The Armenian Question" reflects the attitude of the author and the Russian society to the Armenian Question at the end of the 19th – beginning of the 20th century. He criticizes the flaws of the Russian diplomacy regarding the Armenians in the Caucasus and Asia Minor, and the consequences of this policy [8].

- the English journalist *Emile Dillon* (1854 – 1933), who in February – March 1895 was in Western Armenia as a correspondent for the London newspaper *The Daily Telegraph*. His travelogue "The Condition of Armenia" contains objective analytical conclusions and numerous testimonies of the destructive policies pursued by the Ottoman Empire against the Armenians in the late 19th century [9].

- the American missionary *Frederick D. Greene*, who was in Western Armenia during the 1894 – 1896 massacre. In his works he presents

the plight of the Armenians in the Ottoman Empire at the end of the 19th century, analyzes the causes of the pogroms and massacres of Armenians in 1894 – 1896, examines the policy of the European countries and the US on the Armenian issue, as well as the attitude of the world public [10].

The historiographical material examining Russian policy towards the Armenians in the Ottoman Empire from 1894 to 1897 is considerably limited. The basic work of *Arman Kirakossian* - "Britain and the Armenian Question (1890s)", although devoted to the policy of England on the Armenian Question, gives considerable attention to the behavior of the Russian government and diplomacy. Another writing of the same author "British Diplomacy and the Armenian Question: From the 1830s to 1914" analyzes the development and evolution of British foreign policy in the context of international dynamics and foreign policies of the great powers [11].

Particularly valuable to Bulgarian historical science is the study of *Bozhidar Samardzhiev* "The Armenian Question and England (1894 – 1897)". A large number of English, German, French and Turkish documents has been introduced for the first time, which show unambiguously the behavior of the great powers during the bloody events in the Ottoman Empire [12].

Undoubtedly, one of the most valuable studies on the Armenian Question in general is the writing of the contemporary Armenian historian *Valery Tunyan* [13]. Particularly noteworthy are his numerous articles and monographs on the subject of Russian politics in Armenia and the Caucasus and on the political history of the Armenian Church.

The negative role of the Russian government and the lack of interest of the Russian public in Armenian events in Ottoman Turkey can also be judged by the behavior of its ally France. In this respect, *Marat Kharazian's* research "France and the Armenian Question (1894 – 1908)" [14] – the result of years of research in French archives and libraries, is extremely valuable. The attitude of the French government and the French public to the Armenian massacres from 1894 to 1896 is shown and analyzed in detail. France's interest in the fate of the Armenians is explained not only by its serious economic and financial interests in the Ottoman Empire, but also by its alliance with the Russian Empire, which puts French foreign policy dependent on Petersburg.

THE BEGINNING OF THE ARMENIAN CRISIS (1894 – 1895)

The Berlin Peace Treaty of 1/13 July 1878 was of particular importance to the Armenian people in the Ottoman Empire. On the one hand, the issue of Armenia was internationalized, and European countries were beginning to show interest in the fate of Armenians in the East Anatolian vilayets, but on the other hand, it was provoking the outrage of the Ottoman government, which was beginning to show open hostility towards the Armenians.

Since 1878 none of the provisions of the Berlin Treaty affecting the Armenians had been implemented. Neither reforms had been introduced, nor the protection of the Armenians from the Kurds and Circassians ensured, nor did the Porte "periodically notify" the great powers of the "measures taken", nor there was any control by the forces themselves [15]. This is explained by the fact that not all countries were equally interested in Asia Minor in order to compel Sultan Abdul Hamid II to fulfill his reform duties, but also because of the lack of unanimity between them as well as their commitment to their own foreign and colonial problems.

These favorable conditions for the Sublime Porte give to it the opportunity not only to disregard the formal commitments under an international treaty, but also to embark on an openly repressive domestic policy aimed at eliminating them. The 1890s marked the beginning of this policy, continued by the Young Turks in the early twentieth century. According to the contemporary French publicist Jean-Marie Carzou, the Abdul-Hamid pogroms of 1894 – 1896 represent a "rehearsal" for the 1915 genocide [16].

The whole system of socio-economic and national political pressure on the Armenians in the Ottoman Empire has become more active since the early 1890s [17]. Lawlessness and harassment by local authorities provoked rebellious sentiment among Armenians, resulting in a serious internal crisis. In this situation, from August to September 1894, the first mass pogroms against the Armenians in the empire began – the so-called the Sasun massacre [18] as a result of which about 5,000 to 12,000 Armenians were killed according to various sources [19]. When details of the Sasun events penetrated the European press, a strong wave of

discontent among the public erupted, especially among the English public, followed by the French. Public opinion in these countries began to exert a strong influence on governments to introduce reforms in Armenian-populated Ottoman regions.

Overall, London was most energetic and active [20]. In October-November 1894 the British government demanded that the High Porte must conduct an independent inquiry into the events in Sasun and punish the culprits, while in the meantime was trying to persuade other European countries to cooperate on the Armenian Question on the basis of Art. 61 of the Berlin Treaty [21]. Approaches were made for joint Anglo-Russian-French action in Armenian affairs, but Paris and Petersburg showed little interest [22]. Of interest was the assertion in historiography, but not sufficiently proven, that England proposed to Russia to occupy Western Armenia and restore order there, in return for Russian support for the establishment of English rule in Egypt. However, the imperial rulers refused to join such plans and change the established status quo in the Ottoman Empire [23].

What was Russia's reaction to what was happening with the Armenians in Asia Minor? Overall, it can be concluded that in the last two decades of the 19th century, Petersburg showed no interest in their fate. Following the Congress of Berlin, the tsarist government pursued a policy of non-interference in the internal affairs of the Ottoman Empire and preservation of the status quo in the region. The reasons for this change in attitude towards the Armenians are complex and relate to the following foreign and domestic political conditions in the empire:

- A negative attitude towards the growing Armenian national liberation movement in the Ottoman Empire was emerging in the tsar's ruling circles, threatening to spread among the Armenians in Russia (numbering over 1 million).

- The attitude of Petersburg to the Western Armenians during this period was directly related to what was happening in Eastern Armenia. Since the end of the 19th century, there had been a serious deterioration of Russian-Armenian relations within the Russian Empire, caused by the assimilation actions taken by the tsarist authorities. Because of this domestic policy, the Russian government had taken a neutral position during the Armenian massacres in Sasun, which actually benefited Sultan Abdul Hamid II.

- The Russian government as a whole was not opposed to improving the living conditions of the Armenians in the Ottoman Empire, according to Art. 61 of the Berlin Treaty, but was firmly against taking any action that would lead to the creation of independent Armenia or even to the formation of an autonomous or semi-autonomous province. The experience with Bulgaria raised concerns in Petersburg that an autonomous Armenia could easily fall under the influence of a foreign country (Great Britain, Germany), which would directly threaten Russian interests.

- Since the summer of 1894 the attention of Petersburg had been focused on the events in the Far East, where the Sino-Japanese War has been waged (1894 – 1895) as a result of which Russia during this period did not want to engage in Near Eastern matters.

Ultimately, under pressure from European diplomacy, especially British diplomacy, the Porte agreed to set up an inquiry commission to investigate the events in the Sasun area and punish those who were responsible [24]. Because it did not envisage the involvement of impartial European participants and because of misleading reports in the Ottoman press that the commission was tasked with investigating "criminal acts committed by Armenian robbers" [25] the Foreign Office initiated the establishment of a separate consular commission of representatives of England, France and Russia [26]. Although both Petersburg and Paris watched with concern and suspicion the activity of British rulers, they joined the commission believing that it was not in their interest to leave England alone in its attempts to intervene in the internal crisis of the Ottoman Empire [27]. However, this did not mean that the tsarist government was reverting to its old policy of protecting the Christian peoples in Ottoman Turkey. On the contrary, Russian diplomacy agreed to take part in the investigation of the Sasun events precisely with a view to keep the Armenian Question within the appropriate narrow limits and prevent it from growing into a complex international problem [28].

Evidence of this is the limited prerogatives that Russia and France imposed on European delegates. For example, rejecting the English proposal to set up a consular committee and accepting the appointment of other lower-ranking representatives; European delegates did not receive the status of members of the Ottoman Investigation Commission; they would only support the investigation.

From January to July 1895 the Ottoman Investigation Commission together with the British, French and Russian delegates conducted investigations into Sasun events in the Bitlis vilayet. On the one hand, intimidation and harassment of witnesses by the local Ottoman authorities, and on the other hand, disagreements between European delegates did not allow a fair and impartial investigation to be carried out. When British Foreign Minister John Kimberly (1894 – 1895) proposed to his Russian counterpart Alexey Lobanov-Rostovsky (1895 – 1896) to take more vigorous action in the investigation, the latter refused to cooperate expressing his suspicion that in Bitlis there would be any satisfactory result at all and that the perpetrators of the Sasun massacres would ever be punished [30].

NOTES

[1] "Eastern" and "Western" Armenia are terms in historiography; the border between the two Armenians passes through the Ararat valley and the Aras river. In 1639, with the treaty of Zuhab (Qasr-e Shirin), the Armenian lands were divided between the Persian and Ottoman empires. Eastern Armenia goes to the Safavids and Western Armenia goes to the Ottomans. At the beginning of the 19th century (1813 – 1828), during the Russian emperors Alexander I (1801 – 1825) and Nicholas I (1825 – 1855), those Armenian lands that were still in the control of the Persian shah were annexed by Russia, the so-called Eastern Armenia. Thus, after 1828, the Armenian lands were divided between the two forces in the region - the Russian Empire, within its borders remained Eastern/Russian Armenia, and the Ottoman Empire controlling Western/Turkish Armenia.

[2] About Britain's "splendid isolation" see Peeva, P. Britain and the end of the "Splendid isolation" (1901 – 1904 г.) – In: Annual of Assen Zlatarov University, Burgas, 2015, V. XLIV, book 2, pp. 31 – 36, ISSN 13121359 (Пеева, П. Британия и краят на „блестящата изолация“ (1901 – 1904 г.) – В: Годишник на Университет „Проф. д-р Асен Златаров“, Бургас, 2015, т. XLIV (2), с. 31 – 36).

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Խմբագրությամբ Ս. Գ. Ներսիսյանի: Հայկական ՍՍՀ ԳԱ հրատարակչություն, Երևան, 1966).

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[15] See Art. 61 of the Berlin Treaty: “The Sublime Porte undertakes to carry out, without further delay, the improvements and reforms demanded by local requirements in the provinces inhabited by Armenians, and to guarantee their security against the Circassians and Kurds. It will periodically make known the steps taken to this effect to the powers, who will superintend their application” – Leo, op. cit., p. 101; *Collection of treaties of Russia with other states. 1856 – 1917* /Ed. E. A. Adamov, comp. Kozmenko/. Moscow:

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[16] Jean-Marie Carzou, *Arménie 1915: Un Génocide exemplaire*. Paris: Flammarion, 1975, p. 61 – cited by Kharazian, M. op. cit., p. 15.

[17] The plight of the Armenians after the Congress of Berlin is evidenced by messages from Russian, French and English diplomats in different parts of the Ottoman Empire – see: *Genocide of the Armenians...*, doc. № 5, 7, 8, 10, 11, 12, 13, 14, 15, 17; *Armenian Genocide...*, doc. № 36; Kharazian, M. op. cit., pp. 48 – 52.

[18] Sasun, the vilayet of Bitlis; see: Dillon, Emile J., op. cit, pp. 153 – 189; Frederick D. Greene, op. cit.

[19] *Genocide of the Armenians...*, doc. № 20, 24, 25.

[20] Since the subject of our study is Russian politics during the Abdul-Hamid pogroms against Armenians, we will not dwell on the actions of English and French diplomacy here.

[21] Samardzhiev, B. op. cit., pp. 41, 45 – 46; Kirakossian, A. *Britain and the Armenian Question...*, pp. 42 – 43.

[22] England, France and Russia engaged in the Armenian crisis of the 1890s; Germany, Austria-Hungary and Italy were generally indifferent to what was happening with the Armenians.

[23] Samardzhiev, B. op. cit., pp. 45 – 46, 60 – 61; Kirakossian, A. *Britain and the Armenian Question...*, pp. 43 – 44; Tunyan, V. *Russia and the Armenian Question*. Yerevan, 1990, p. 130; Shirokorad, A. *Russia-England: The Unknown War, 1857 – 1907*. Moscow, 2003, pp. 361 – 362 (Широкоград, А. *Россия-Англия: неизвестная война, 1857 – 1907*. Москва: АСТ, 2003, с. 361 – 362).

[24] *Blue Book. Turkey № 1, part 1 (1895)*. Correspondence relating to the Asiatic Provinces of Turkey. Events at Sassoon, and Commission of inquiry at Moush. London, 1895, p. 22, doc. № 37.

[25] Quotation from Samardzhiev, B. op. cit., p. 42; Kirakossian, A. Britain and the Armenian Question..., p. 45.

[26] Blue Book. Turkey № 1, part 1 (1895) ..., p. 32, doc. № 56; pp. 32-33, doc. № 57; p. 42, doc. № 69.

[27] Ibid., pp. 48, 49, doc. № 91-92; pp. 58-59, doc. № 119.

[28] Samardzhiev, B. op. cit., p. 47.

[29] Composition of European Delegates: from the English side – Vice-Consul to Erzurum H. Shipley; on the French side – dragoman M. Wilber; from the Russian side – the secretary of the Consul General in Erzurum M. Przewalski – Blue Book. Turkey No. 1, Part 1 (1895) ..., p. 50, doc. № 95.

[30] Ibid., pp. 92-93, doc. № 179.

**THE ARMENIAN QUESTION IN THE 1890s AND RUSSIAN POLITICS
(1894 – 1897)
PART TWO**

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ABSTRACT

The Armenian Question, one of the most complex national issues in the Ottoman Empire, had developed into a serious diplomatic problem since the late nineteenth century. The great powers interfered in its resolution, driven by their own political and economic interests in the region. England, France and Russia were primarily involved in the Armenian crisis of 1894 – 1897, which found expression in massacres and the Turkish government's failure to fulfill its reform obligations. Russia was the most important factor in resolving the Armenian Question. However, tsarist policy was generally volatile, inconsistent, and indecisive, as was its overall policy on the Eastern Question, according to some authors. This issue lacked a clear government agenda; there were numerous and different perceptions among the political circles of the country about the nature of Russian interests in Armenia. For these reasons, the tsarist government did not want to exacerbate the situation in the Ottoman Empire and was very cautious and reserved about the issue of introducing reforms in the Armenian vilayets, according to Art. 61 of the Berlin Peace Treaty. There were two main goals, which Petersburg pursued in the Near East during the period under review. The first one was the preservation of the integrity of the Ottoman Empire and the second one - maintenance of the Straits regime. In this sense, the activation of the Armenian Question was contrary to the interests of Russia, which is why it manifested a deliberately passive policy against the anti-Armenian actions of Sultan Abdul Hamid II.

Key words: *Armenian Question, Russian diplomacy, English diplomacy, Ottoman Empire, Abdul Hamid's politics*

**THE REFORM PROGRAM FOR THE
EASTERN VILAYETS (1895)**

Despite the practical failure of the Bitlis Inquiry Committee, the British Government continued its active efforts on the Armenian Question, mainly for parliamentary reasons - to satisfy public opinion, as well as Armenian committees and Liberals, as parliamentary elections were pending in the country. However, Britain's Near East policy can be explained by another concern from the ruling circles – the assumption that if nothing is done to improve the situation of the Armenians, the revolutionary movement will grow, the Sublime Porte will resort to new repression, and this will give Russia an opportunity to intervene with military force to bring order to these border provinces. As a result of these events, unrest may occur in other Ottoman territories, and as it has grown obvious, the problem will no longer be able to be controlled by peaceful means [1]. Despite these considerations, the Foreign Office did not want

to take isolated actions on the Armenian Question for two main reasons:

1) There was no direct benefit to the country from taking sole action on the Armenian Question. London administration did not want to engage too much in a region where another force (Russia) had far more influence and more real prospects to benefit itself.

2) Involving more countries in the action would create greater opportunities for success and, if lost, would allow it to share or put the blame to others [2].

At the beginning of 1895, the British ruling circles came up with a new initiative on the Armenian Question, trying to reach an agreement with Russia and France. Since February to April 1895, complex and controversial negotiations were held among the three governments to develop a common reform agenda for the six eastern vilayets. Russia was reluctant to take part in this project, as it did not want to divert its focus from events in the Far East. In addition, among the tsarist leadership,

there was a suspicion that the United Kingdom aimed to push Russia into occupation of Western Armenia through its activities and therefore to worsen Russian-Turkish relations [3]. In order not to allow this and not to allow British influence in the region to intensify, Russian diplomacy had succeeded in pushing for serious restrictions and had cut in English reform proposals, especially as regards enforcement of the Sublime Porte.

On 18 April 1895 the ambassadors of England, France and Russia in Constantinople formally agreed on a reform project for the Armenian provinces [4]. On 11 May 1895 the Ottoman government officially submitted a memorandum and project for administrative reforms in eastern vilayets of Asia Minor (Erzurum, Bitlis, Van, Sivas, Mamuret-ul-Asis and Diyarbakir) [5].

In general, **the Memorandum** provided the following:

- Reducing the number of Eastern Vilayets by ethnic grouping. This would allow for cost savings for the administration, would facilitate the choice of the vilayets and would strengthen their power and financial position (Article 1).
- Great powers reserved the right to protest to the Porte if the choice of Valis was inappropriate (Article 2).
- A High Commissioner would be appointed, selected by the Sultan and approved by the Powers, which should oversee the rapid and accurate implementation of the reforms and who would have authority over the Valis. The High Commissioner will be assisted in his work by an Assistant, who must be a Christian if the High Commissioner is Muslim and vice versa (Art. 7).
- A Permanent Commission of Control was set up at the Porte to oversee the rigorous implementation of the reforms (Article 8).
- In the other vilayets of the Ottoman Empire, where the Armenian population constituted a significant proportion, a Christian employee would be recruited to the Vali, who will regularly report to the Control Commission in Constantinople on the situation of the population (Article 12).
- The Sultan government would grant amnesty to Armenians convicted and/or detained for political reasons (Article 3).
- Refugees would have the right to return to their places of origin (Article 4).
- All pending criminal cases or offences against the common law must be resolved

immediately by legal commissions with the participation of Christian members (Art. 5).

- Conditions in prisons would be improved (Article 6).
- Victims of Sasun events would be compensated (Article 9).
- Violent Muslims would be stopped (Article 10).
- The rights and privileges of the Armenian clergy and community would be strictly respected in accordance with Sahmanadroutyun of 1863 (Armenian Organic Statute, Սահմանադրություն) and the Berats granted by the Sultans (Article 11).

The Administrative Reform project, for its part, proposes the following transformation scheme:

- The Valis will be appointed by the Sultan and selected among high-ranking dignitaries according to their intelligence, honesty and ability, regardless of their religious affiliation. They shall be eligible for 5–year term with the right to re-election. The Valis cannot be recalled prematurely or changed unless they are found guilty, after legal trial, of acts contrary to the laws. The Valis will be assisted by Moavins who shall be Christians when the Valis are Mussulmans and Mussulmans when the Valis are Christians. In addition, the Valis will be supported by the Provincial General Council (Part I).
- Leading the sandjaks Sultan will appoint Mutessarifs and head of the kazas – Kaimakams. It is envisaged that in sandjaks and kazas predominantly Christian population to be appointed respectively Mutessarifs Christians and Kaimakams Christians. The Mutessarifs and Kaymakams of Christians should not be less than 1/3 of their total number in the vilayet. Both posts will be assisted by the Moavins, respectively, with the principle opposite to the religion of the governor, as well as to the Councils (Part II, III).
- Each nahiya should be managed by a Mudir elected and supported by the Council, elected by the people (Part IV).
- Police and gendarmerie officers must be recruited without distinction as to their religious and national origin (Part V, VI).
- It is recommended that the prison procedures and sanitary conditions be improved significantly (Part VII).
- In order to prevent the abuse of arrests, the Valis must organize in the capitals of the vilayets and the sandjaks a Committees of Preliminary

Inquiry, composed of a chairman and two members – one Muslim and one from another religion (Part VIII).

- A number of measures are envisaged to control the Kurds and curb the activities of the Hamidie cavalry (Part IX, X).

- A special Commission, composed of a chairman and four members (two Muslims and two Christians), will be set up to protect the property rights and correct the irregularities found (Part XI).

- It is envisaged that the collection of taxes, including the tithe, will be carried out under the control of the Mudir by collectors elected by the Councils of the nahies. The farming of the tithe and the angaria is abolished (Part XII).

- A number of measures to improve justice are recommended (Part XIII).

It is clear that the reformed great powers Scheme contains too modest and minimal recommendations for the administrative, legal and financial improvements need to restore public order and ensure the proper functioning of the six Eastern Vilayets. The Russian government's fears that the reforms will create the preconditions for the formation of an autonomous Armenian region cannot be justified. Moreover, the scheme does not go beyond Ottoman law itself and contains almost no real practical guarantees to provide Armenians with better and safer living conditions.

Considering the contradictions among the great powers, the Sublime Porte strongly rejected the proposed reform scheme [6]. Abdul Hamid II declared himself more substantial in the project, against all forms of guarantee, control and intervention. According to the Ottoman rulers, "if the Armenians were given reforms as was outlined in the project, it meant to create an opportunity for an independent Greater Armenia and to provoke even more demands on their part"[7].

The diplomatic struggle over the Armenian Question continued for about 6 months. On the one hand, there was a complex political game among the three forces (England, France and Russia) and the Porte, and on the other, there was a tension in the relations among the forces themselves. In no European country was there a pro-Armenian sentiment that shook the whole of England, but every initiative of British diplomacy was met with vigorous resistance from the Russian government, backed by the French. All British proposals for pressure on the

Sublime Porte, Petersburg and Paris strongly opposed [8]. According to Russian Foreign Minister Alexey Lobanov–Rostovsky, the three countries had no right to resort to any coercive measures in the event of the Sultan's refusal [9]. The royal political line on the Armenian issue was guided, as mentioned above, by the fear that the reform of the measures would lead to the creation of an independent Armenian region. Lobanov-Rostovsky told himself to the British Ambassador to Petersburg Frank Lascelles that Russia cannot agree to support by pressure and coercion a policy aimed at "creating in Asia Minor an area where Armenians will enjoy exceptional privileges and which will form the nucleus of a future independent Armenian kingdom" [10]. Bulgaria, which after its liberation in 1878 gradually deteriorated relations with Russia in the 1880s, was given as an example. Petersburg was forced to lead a very cautious policy on the Eastern Question: "Russia will not allow the formation of a new Bulgaria at its border" [11].

As evidenced by the documents, the tsarist rulers also feared the spread of revolutionary propaganda in their Caucasian lands [12]. In the 1890s, relations between the Russian authorities and their Armenian subjects were severely strained. Central government's attempts to Russify Armenian province faced strong opposition from the population, which was seen as a manifestation of rebellion and separatism [13]. The Petersburg cabinet estimated that granting reforms and privileges to Armenians in the Ottoman Empire would further increase the arousal status of Armenians in Russia, against whom the authorities were taking harsh measures to prevent arms and money being sent across the border [14]. Thus, exaggerating the danger of an Armenian revolutionary wave, Russian diplomacy refused to take the Armenian Question seriously and to exert any pressure on the High Porte.

In the meantime, frustrated by the weak activity of the great powers, the Armenian Committees decided to take the initiative. On 18/30 September 1895 a peaceful demonstration was organized in Constantinople, organized by the Hnchak Party (Հնչակ), notified in advance of the great powers [15]. This action prompted the Ottoman authorities to launch new massacres of the Armenian population in the capital and province, to which European forces responded passively and with restraint. The only result of this bloodshed was that the ambassadors of

England, France and Russia in Constantinople were stepping up their pressure over the Sublime Porte to introduce transformations in the eastern provinces. After all, on 5/17 October 1895 Sultan Abdul Hamid II unexpectedly signed the Sultan's irade for the adoption of the reform scheme, and on 20 October 1895 the program was promulgated [16]. However, this document, like many others before it, remained only on paper and the violence against Armenians in Asia Minor continued. Because of the massacres, it could be increasingly difficult to prove that the Armenians were a dominant national element in the reformed areas, which was also the primary goal of the Sultan's government.

THE DEVELOPMENT OF THE ARMENIAN QUESTION AFTER ADOPTION OF THE REFORM PROGRAM (1896 – 1897)

The failure of the Sultan authorities to fulfill their reform obligations reinforced the revolutionary sentiment among the Armenian committees. On 14/26 August 1896 a group of Armenians from the Dashnaksutyun Party (Դաշնակցութիւն) seized weapons and bombs from the Ottoman Government's central bank in order to draw the attention of European countries [17]. In response to this action, nearly 10,000 Armenians were killed in Constantinople from 26 to 30 August [18].

How did the Russian government react to what was happening in the Ottoman capital? Unlike previous events, the royal diplomacy is now very vigorous, which can be explained by the fact that the takeover of the Ottoman Bank threatened the integrity of the securities and sums invested by the great powers and directly affected their interests. The incident was resolved through the mediation of the Russian dragoman V. Maximov - the evacuation of the bank was secured just on the second day – 27 August and the Armenian attackers were provided with unimpeded departure from the country. As for the massacres organized by the Ottoman authorities, they did not provoke either international intervention or any other form of sanction [19]. The only action the forces took was the verbal notes of protest [20], which, however, had no consequences.

Abdul Hamid II's anti-Armenian policy was met with widespread indignation and rebuke in Britain. On 20 October 1896 the British Government launched a new initiative on the

Armenian Question. Prime Minister Lord Salisbury called on the Powers to convene a pan-European ambassador conference to finally resolve the Armenian crisis and avoid the collapse of the Ottoman Empire [21]. The proposal emphasized the need for international intervention in the event of the Sultan's refusal.

Russian Emperor Nicholas II and new Foreign Minister Nikolay Shishkin at first categorically rejected the English proposal. Subsequently, however, a reversal of the tsar's opinion occurred, and on 25 November 1896 Petersburg agreed to convene an ambassadors' conference and discuss the methods of force to be applied in the event of Ottoman refusal [22]. The data we have available suggest that the reasons for this unexpected change in the position of the Russian government was due to the lack of a clear government program and to the fluctuations in the domestic and foreign policy of the empire. At the end of the 19th century, the political leadership of Russia outlined numerous and contradictory views on the nature of Russian foreign policy interests. Two main concepts were generally confronted - Russian Ambassador to Constantinople Alexander Nelidov proposed that the empire seize the internal crisis in Turkey and occupy the Bosphorus, while Finance Minister Sergei Witte opposed such actions and insisted on active actions in the Far East. The emperor was indecisive for his part [23]. In the end, Nelidov's conquest plans were rejected; The Russian government decided not to take action to change the status quo in the Near East.

From late December 1896 to early February 1897, the ambassadors of the six great powers in Constantinople made a last-ditch effort to resolve the Armenian crisis. On 9 February 1897 another reform agreement was signed, without providing for coercive measures to ensure its implementation. Again, the opposition of Petersburg and Paris was at the heart of this decision. The subsequent outbreak of the Cretan revolt and the aggravation of Greco-Ottoman relations pushed the Armenian question to the background and drew the attention of the great powers for a long time. Meanwhile, Sultan Abdul Hamid II continued his policy of systematic repression and persecution of the Armenian population.

CONCLUSION

The events of 1890s represent a turning point in the history of the Armenian Question. There has been a significant change in the policy of the Ottoman Government against the Armenians since the Congress of Berlin, characterized by open hostility and aggression, and the lenient attitude of Europe has created favorable conditions for such a policy. Although with the Berlin Peace Treaty, the six great powers secure the right to intervene in the internal affairs of the Ottoman state through Art. 61, they only remember their commitments on the Armenian Question when their own political and economic interests demand it. In fact, Europe has no interest in supporting the national liberation movements of the sultan-dominated peoples, as this would disintegrate the empire. In this sense, the policy of preserving the status quo in the Ottoman Empire played a negative role in resolving the Armenian Question. The sole aim of European countries is to strengthen the internal order and prevent its collapse by minimally improving the living conditions in Ottoman Turkey.

Of particular interest in these events is the attitude of Russia, one of the main guarantors for the implementation of Art. 61 of the Berlin Treaty. Although traditionally defend the rights of Christians in the Ottoman Empire in the diplomatic problem with the introduction of reforms in the Armenian vilayets in 1890s, Petersburg manifest deliberate redundancy [24]. The Russian Foreign Minister Nikolay Girs (1882 – 1895) stated to the German diplomat Friedrich von Pourtales in the fall of 1890: "Although Russia is not indifferent to the fate of the Armenians, it does not want to raise the Armenian Question. Armenia is really expecting the implementation of the provisions of the Berlin Treaty, but Russia is not interested in this and will do nothing to speed up their implementation ... "[25]. Following its own interests, until the first decade of the twentieth century, Russia firmly adheres to a policy of preserving the status quo in the Near East, declaring itself against any international actions aimed at exerting pressure on the Sublime Porte and granting privileges to the Armenians. However, this foreign policy of Petersburg becomes a tactical mistake for the interests of Russia itself. In that way, it is losing for a long time the trust and sympathies of the three million Armenian population. As a consequence,

Russia's influence in this strategically important region becomes significantly smaller.

NOTES

[1] Samardzhiev, B. *The Armenian Question and England (1894 – 1897)*. Sofia: "St. Kliment Ohridski" 1994, pp. 31, 44, 59.

[2] *Ibid.*, pp. 45 – 46.

[3] Kirakossian, A. J. *Britain and the Armenian Question (1890s)*. Yerevan: Hayastan, 1990, pp. 53, 136.

[4] Blue Book. Turkey № 1 (1896) Correspondence respecting the introduction of reforms in the Armenian Provinces of Asiatic Turkey. London, 1896, p. 27, doc. № 23.

[5] *Ibid.*, pp. 34 – 65, doc. № 45.

[6] *First refusal*, June 3, 1895 – Blue Book. Turkey № 1 (1896) ..., pp. 72, 73, doc. № 68,69; *Second refusal*, June 17, 1895 - *Ibid.*, pp. 88, 89, doc. № 95 (Inclosure in No. 95); *Third refusal*, August 1, 1895 - *Ibid.*, pp. 99 – 114, doc. № 130.

[7] Quotation by Kirakossian, A. *Britain and the Armenian Question...*, p. 52.

[8] Samardzhiev, B. *op. cit.*, p. 98; Kirakossian, A. *Britain and the Armenian Question...*, pp. 63, 66.

[9] Blue Book. Turkey № 1 (1896) ..., p. 71, doc. № 65; p. 73, doc. № 71; p. 81, doc. № 76.

[10] *Ibid.*, p. 73, doc. № 71; p. 87, doc. № 94.

[11] *Ibid.*, p. 87, doc. № 94.

[12] *Ibid.*, p. 68, doc. № 54; p. 81, doc. № 76; p. 87, doc. № 94.

[13] See: Jivelegov, A. *Turkey and The Armenian Question*. Yerevan, YSU, 2014, pp. 67 – 93.

[14] Blue Book. Turkey № 1 (1896) ..., p. 87, doc. № 94.

[15] Blue Book. Turkey № 2 (1896) Correspondence relative to the Armenian Question and reports from her Majesty's consular officers in Asiatic Turkey. London, 1896, p. 30 – 35, doc. № 50, Inclosure 1, Inclosure 2; Kochar, Mary. *The Turkish–Armenian Social–Political Relations and the Armenian Question*. Yerevan: YSU, 1988, p. 34 (Кочар, Мери. Армяно–турецкие общественно–политические отношения и армянский вопрос. Ереван: изд-во Ереванского университета, 1988, с. 34).

[16] Blue Book. Turkey № 1 (1896) ..., pp. 158 – 159, doc. № 198, 199, 200; pp. 160 – 170, doc. № 204.

[17] Blue Book. Turkey № 1 (1897) Correspondence respecting the disturbances at

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[18] Samardzhiev, B. op. cit., p. 166; Kirakossian, A. Britain and the Armenian Question..., pp. 88-89; Kharazian, M. From Illusion to Tragedy: France and the Armenian Question (1894 - 1908). Yerevan, 2011, p. 61.

[19] Samardzhiev, B. op. cit., p. 170.

[20] Blue Book. Turkey № 1 (1897) ..., p. 2, doc. № 4; p. 6, doc. № 10.

[21] Blue Book. Turkey № 2 (1897) Correspondence respecting introduction of reforms in the administration of the Ottoman empire. London, 1897, pp. 1 – 5, doc. № 2.

[22] Ibid., p. 15, doc. № 22; pp. 15 – 16, doc. № 24; pp. 16 – 17, doc. № 25.

[23] For more on the positions of Alexander Nelidov and Sergei Witte, see: Project to capture the Bosphorus in 1896. Prev. In M. Khvostov – In: Red Archive, 1931, No. 4 – 5 (47 – 48), pp. 50 – 70; The problem of the capture of the Bosphorus in the 1890s – In: The Marxist Historian (Questions of History), 1930, № 20, pp. 100 – 129 (Хвостов, В. Проблема захвата Босфора в 90-х гг. XIX в. – В: Историк-марксист (Вопросы истории), 1930, № 20, с. 100 – 129); Witte, S. Y. Memories: The reign of Nicholas II. Vol. 1. Leningrad: State Publishing House, 1924, pp. 80 – 85 (Витте, С. Ю. Воспоминания: Царствование Николая II. Т. 1. Ленинград: Государственное издательство, 1924, с. 80 – 85); Tunyan, V. Russia and the Armenian Question. Yerevan, 1990, p. 161; Samardzhiev, B. op. cit., p. 179; Kirakossian, A. Britain and the Armenian Question..., p. 106.

[24] See the analysis of Alexander Amfiteatrov – a Russian journalist, contemporary of events, who presents an interesting and objective presentation of the attitude of Russian diplomacy to Armenians in the Caucasus and Asia Minor at the end of the 19th – beginning of the 20th centuries. – Amfiteatrov, A. The Armenian Question. Yerevan: YSU, 2015, pp. 13 – 60.

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GREAT BRITAIN AND THE AGADIR CRISIS

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ABSTRACT

After 1905, the Anglo-German tensions grew high partly due to a military contest between Germany and Great Britain. Following the Algeciras conference Great Britain and France signed agreements with Spain for the maintenance of the status quo in the Western Mediterranean. With these agreements, Great Britain aimed to remove any danger to Gibraltar and to strengthen Spain. The main rivalry, however, was between France and Germany and it was displayed not elsewhere but in Morocco again. A series of events, which happened between 1907 and 1910, helped France to assert its influence in Morocco and there was a little doubt that it was going to take control over the whole territory. During the period, Germany was the other Great Power, which had economic interests in southern Morocco, mainly in mining. Although the two countries agreed to respect each other's economic interests, it was clear that France would do everything to limit Germany's economic penetration in the region.

This paper focuses on some factors and events with reference to Anglo-German relations during the Second Moroccan (Agadir) Crisis. It discusses the British motives, main objectives and involvement in the crisis. The research uses documents from the official documentary series "British Documents on the Origins of the War 1898-1914" as a basic source material.

Keywords: British Foreign Policy, Agadir Crisis

INTRODUCTION

After the Algeciras Conference, the gap between the two European camps became even wider. In a forty-three page memorandum of January 1, 1907, on the status of British relations with Germany and France, the British Foreign Office official and diplomat Eyre Crowe explained:

„The only check on the abuse of political predominance derived from such a position has always consisted in the opposition of an equally formidable rival, or of a combination of several countries forming leagues of defence. The equilibrium established by such a grouping of forces is technically known as the balance of power, and it has become almost an historical truism to identify England's secular policy with the maintenance of this balance...“[1].

In his analysis of the international situation, Crowe argued that equality was broken and that the country that broke the balance and tried to gain dominance over Europe was Germany. In his opinion, German ambitions were a threat to the existing world order, comparable to the threat from France during the time of Napoleon Bonaparte. Crowe speculated in his memorandum that probably Germany was definitely aiming at a general political hegemony and maritime as-

pendency, threatening the independence of her neighbours and ultimately the existence of England. He described the state as the most aggressive force with the greatest military capabilities. In terms of the balance of power, Russia and France could counteract German power. However, after the Russo-Japanese War, Russia was weakened. That is why, Britain also needed to get involved in a combination that could balance the lost equilibrium in international politics [2]. He insisted that Britain needed to take a firmer line towards Germany.

Crowe's memorandum had an immediate effect. The British foreign minister Edward Gray found it "most valuable". Crowe's opinion corresponded to Foreign office perceptions that concessions to Germany meant loss of prestige and defeat. His perceptions dominated the "official mind" of Foreign office.[3] Urged by him, the foreign minister Gray made decisions that involved Britain actively in the Moroccan crisis in June-November 1911.

Although the Agadir crisis has been well explored in British historiography, there are still controversial interpretations of some events. In addition, since the focus of the researches is mainly on the Anglo-German relations, less attention has been paid to the Anglo-Spanish rela-

tions. Similarly, the Bulgarian historiography contributes to the understanding of the topic by exploring the international relations and conflicts during the first decade of the XX century [4].

The aim of this paper is to look at the British political line during the Agadir crisis. Britain acted as an intermediary during the negotiation between France, Spain and Germany. At first cautious and reserved, later more determined and involved, she eventually helped in resolving the crisis.

For this purpose, a valuable set of documents was used as a base of the research process. These documents, mainly diplomatic papers, are published in the documentary series, edited by G.P. Gooch and Harold Temperley *British Documents on the Origins of the War 1898-1914*.

THE AGADIR CRISIS

Following the Algeiras conference Great Britain and France signed agreements with Spain for the maintenance of the status quo in the Western Mediterranean. It aimed to remove any danger to Gibraltar and to strengthen Spain. A series of events happened between 1907 and 1910 – the French bombardment of Casablanca, the recognition of sultan Mulai Hafid by the powers in 1908, the September 1908 crisis, arising from the arrest of foreign deserters at Casablanca, the February 1909 Franco-German agreement for recognition of the French special interests in Morocco [5], the 1910 Franco-Moroccan convention. All these Moroccan disputes and agreements helped France to assert its influence in Morocco and there was a little doubt that it was going to take control over the whole territory.

During the period, Germany was the other Great Power, which had economic interests in southern Morocco, mainly in mining. Although the two countries agreed to respect each other's economic interests, it was clear that France would do everything to limit Germany's economic penetration in the region.

In February 1911, a revolt broke out against sultan Mulai Hafid. The Sherarda tribes were up in arms and a hostile native confederation contrived in a few weeks to surround Fez on all sides. To help sultan Mulai Hafid, France opened negotiation with him. In March, a loan was approved by the French Council of Ministers to enable the Sultan to set up an organized native force, armed under modern conditions, and capable, under French direction, of reducing to obedience insurgent tribes and refractory taxpayers.

The loan was to be secured on certain revenues accruing in the Spanish as well as in the French sphere of influence. One of the items of the draft treaty provided for a railway traversing the Spanish zone from Tangier to Alcazar. There were also arrangements concerning the payment of the foreign-officered port police force after 1 January, 1912, when the provision made for it at Algeiras would expire. No attempt was made to secure the concurrence of Spain in matters so deeply affecting her interests. At Paris, Perez Caballero, the Spanish Ambassador, was kept completely in the dark. London was not informed as well of the loan convention.

After learning the news of the concluded loan convention, the Spanish government reacted negatively and complained to London. The Foreign Office decided to intervene. The Foreign Secretary E. Gray directed the British Ambassador to Paris F. Bertie to remark on the inconvenience arising from this absence of trustworthy information on a matter of such importance. The French foreign minister Jean Cruppi explained that, according to him, Spain overreacted and her suspicions were unjustified. Cruppi promised that he would do his best, to conciliate her interests with those of France [6].

The next move of France, however, confirmed that France would continue to ignore the Spanish interests in Morocco. In early April 1911, France deployed 20000 troops in Fez. Her explanation was that she was obliged to protect the lives of Europeans and to secure the Sultan upon his throne.

The deployment of substantial forces in the interior of Morocco led to the Agadir crisis or the so-called Second Moroccan crisis.

BRITAIN'S INVOLVEMENT

As was expected, the French expedition aroused excitement in Spain. On 4 April, the French foreign minister Jean Cruppi gave friendly assurances to the Spanish Ambassador in Paris. He assured him that if the advance took place, it should be in agreement with Spain. The Spanish government, on its part, answered that Spain would insist on her right herself to maintain order within her zone and would take precautionary measure. At the same time, the Spanish view of the situation was explained to the Foreign office. Spain felt that the provisional occupation of Fez, which France seemed to contemplate, would be bound to develop into a permanent occupation. This would compel Spain to occupy certain localities in her sphere [7].

The Foreign Office did not welcome the French move. According to E. Gray, two dangers could result from the new situation. Firstly, Germany might claim that the decisions of the Algeciras conference were violated and would demand compensations. Secondly, Spain might occupy her zone as a counteraction to the French occupation of Fez. Moreover, Spain and Germany might find the prospect of a joint action on Morocco issue to their advantage.

In the first part of the crisis, the British foreign Secretary was alarmed but still cautious. He was convinced that the French action "was not wise" but the British could not interfere under their agreement. What he could do was to urge an agreement between Spain and France. The advice given by the British Government to Spain was that she should accept French assurances as to the temporary character of the French march on Fez and abstain from forcible action. Such an action could only precipitate the partition of Morocco. She was warned that the political consequences of any unwarranted intervention on her part would be deplorable. Another advice was given to France that France and Spain should come to an agreement on the chief points causing anxiety in Spain. Britain was ready to advocate a direct agreement between them. The British Ambassador made a communication in the above sense to the Spanish Foreign Minister on 5 May. The French Ambassador also spoke to the latter to the same effect.

The idea of a tripartite discussion between France, Spain, and England was favored at Paris as it would counteract German influences in Spain. The frequent intercourse of the Spanish and German Ambassadors at Paris about this time had roused suspicion of a secret understanding between Spain and Germany. The French Government feared that a bargain might be struck between them in virtue of which Germany would obtain Mogador or some other port on the Atlantic, Spain establishing herself at once firmly in her sphere of influence under German protection.

The Spanish government denied the suspected intrigue with Germany. It was a fact that from May onwards the Spanish government adopted a policy of reliance on the guidance of Great Britain.

On that basis, tripartite discussion proceeded in May and June at the British government and after that at Madrid. The object of the discussion was defined as being that "of arriving, in concert with the British Government, at the best way of

applying, in the territory of Morocco, the principles set forth in the conventions of 1904 and in the Act of Algeciras" [8]. The principal point of discussion was freedom of action for Spain in her zone [9]. However, France was not inclined to accept the Spanish proposals.

Despite the French numerous promises to leave Fez, the French troops actually occupied it. The result of the unsuccessful Franco-Spanish negotiations was the landing of the Spanish troops on June 8 at Larache. Five hundred of them were sent at midnight to Alcazar.

The British Government received the news about the Spanish move with surprise in view of the fact that the British were assured that troops would not be landed. The British Government did not expect that the Spanish would openly violate the terms of the Franco-Spanish agreement. The fear was that the action of Spain was likely to lead to political complications both in Morocco and in the general relations of the European Great Powers.

The action of Spain was disapproved in London. The British foreign secretary Edward Grey expressed to the Spanish Ambassador on 13 June great apprehension as to the consequences. He asked if the Spanish troops would not be withdrawn on payment of compensation for the murdered protégé. The Spanish ambassador Villa Urrutia finally admitted that the reason for the Spanish move was not the murder of the Spanish officer. The true motive of Spain lay deeper. Her troops would remain where they were while French activity in Morocco continued. France had shown in the Madrid conversations that she was still quite indisposed to grant the demand of Spain for liberty of action in her zone. The Spanish Government had reason to know that France and Germany were trying to settle the Morocco question between them. Spain would be left out in the cold if she did not look after her own interests. Edward Grey pointed out the two dangers which Spain was provoking — a disturbed northern zone in Morocco, and perhaps a European crisis leading to partition, without much consideration for Spain herself.

In Paris a conversation took place between the French foreign minister J. Cruppi and the Spanish Ambassador on 10 June. Perez Caballero was told that Spain was incurring responsibilities; that France could not acquiesce in a course of action which she regarded as uncalled-for and contrary to the 1904 agreement and to the General Act of Algeciras; and that the conversations at Madrid had now better be suspended. The lan-

guage, however, held by France never amounted to a peremptory protest of the kind which it was afterwards contended had been addressed by her to Spain on this occasion. Geoffray's communications, on the contrary, were framed in the friendliest words. France made her reserves, she did not protest. She explained, through her Ambassador in London, why it was that France could not well take a severe line with Spain. That would lead to a rupture, which might be dangerous. However, she urged England to step in on the basis of the stronger position, which she occupied as the friend of both parties.

During the next days, E. Gray urged upon the Spanish ambassador that the Spanish troops should at least be withdrawn from Alcazar to Larache. Gray insisted that occupation of Alcazar without even notice to France beforehand was a violation of the Secret Agreement between France and Spain, and that if Spain by tearing up the secret agreement with France forced a partition of Morocco there was no certainty that her zone would be recognized. His advice was that, if Spain could not be induced to evacuate, she should at least make a declaration to the Powers on the same lines as the communication made by France respecting Fez, and say that the occupation would not be continued longer than was necessary to restore order. The Spanish Ambassador admitted eventually that the troops could not be withdrawn while French activity in Morocco continued. Meanwhile information was spread that Spain was going to reinforce Alcazar garrison and would take Tangier [10].

On 17 June the Spanish Prime Minister made a statement to the representatives of the press. He said that there would be no move on Tetuan, Arzila or Tangier; Spanish policy had three objects, namely: expansion of Ceuta to make the fortress safe; equal security for Melilla; reinforcement of Larache police to enable them to perform their duties. These measures were of a provisional character, and when Morocco returned to a normal state, the Spanish Government would act accordingly.

Rennie, the British charge d'affaires, was directed to press for a more explicit statement to the effect that when France should withdraw from Fez, Spain would withdraw her troops from El Kasr and Larache.

On 20 June, the Spanish government communicated to the British government a memorandum stating that recent Spanish action was taken to obtain reparation for an outrage on a Spanish official and punishment of the guilty, but that

when order is restored and things had resumed their normal course, the temporary measures taken would cease.

The formal assurance desired by the British Government was thus evaded.

GERMANY'S ATTITUDE

Germany looked upon the situation with satisfaction. The Algeciras Act had given her namely the open door for her commerce and industry, and a claim, in common with other Powers, to exercise a certain influence on the political development of Morocco. Now, the Franco-Spanish tension afforded her with an opportunity of striking a bargain. If Morocco was to be partitioned, she had to have her share or compensation. For a while, the German foreign office decided to wait and see what a turn things would take. The French move was approved and explained as temporary. The German office, however, reserved the right to insist on discussions if necessity arose.

Informal conversations to that effect began at Berlin and Kissingen. At the latter place the idea of compensation in the French Congo had been put forward by the German foreign minister, von Kiderlen, on his becoming convinced that France was determined to exclude Germany from Morocco. What Germany wanted was a large German Empire in Central Africa and a step towards this aim was a territorial gain in French Congo.

In early July, the German government decided to act and dispatched the gunboat Panther to the port of Agadir on July 1.

Spanish press expressed its satisfaction with the German action. In France, the information that Spain was bound to Germany by a secret understanding, appeared to be fully confirmed.

The sympathy, however, which Spain at first displayed with German action, was short-lived. It was soon replaced by a feeling of dread lest Spain should be ignored and isolated as the result of an agreement between Germany and France. Spain came to mistrust Germany as much as France did. Though England had openly blamed her recent action, it was on England that she again placed her reliance now. Spain felt that only England could help her to enter upon her inheritance in Morocco [11].

Britain reacted with concern. "Over Morocco ... gathered the darkest thunder clouds", wrote *The New York Times* on 6 July [12]. Now, throughout this part of the crisis, Gray felt that he should take a more determined stand on the situation and that Britain should adopt the leading

role in the dispute. He called the new situation "serious" as the British interests were highly concerned. The view held in Foreign Office was that Germany was planning to obtain a naval base on the Atlantic coast. If such a thing happened, the British trade roads would be within close distance of a German base at Agadir. In conversations and dispatches to Madrid, Paris and Berlin, Gray explained that Britain would express clearly her interest in the settlement of the Moroccan question. "We had both commercial and strategic interests to consider. As long as only France and Spain, who were charged with special functions in Morocco, were dealing with the situation there, there was no need for us to take any step. But now that Germany had taken special steps on her own account, it would be natural that we should take special steps to protect our own interests" [13]. He insisted that from then on the discussions should not be triple, but quadruple.

The British cabinet discussed the new situation on 4 July. The cabinet resolution suggested that the British interest should be protected in the future Moroccan settlement. If Britain were to accept a German share in Morocco, Germany would expect that a set of conditions would be fulfilled. The cabinet laid down four conditions to the British consent to a division of Morocco. "(1) the internationalisation of Tangiers and its neighbourhood, to be detached from the Moorish Empire, and to be administered by an international municipality; (2) a treaty pledge that no ports on the Morocco coast, either Atlantic or Mediterranean, should be fortified; (3) that Germany should not endeavour to acquire a port on the Mediterranean coast; and (4) the maintenance of the open-door" [14].

Although no official notice was given by Germany as an indication that she would take into account the British position, Germany apparently began to reconsider the situation. On 7 July, the German Ambassador in Paris communicated to the French government that Germany was ready to negotiate for a French protectorate based on guarantees for her economic interests in Morocco and "compensation" in the French Congo.

This situation convinced the Foreign Office officials to take even more a definite line. Gray communicated to the German foreign office that "if the negotiations between her [Germany] and France come to nothing, we must become a party to a discussion of the situation and that as Agadir is a closed port, where we have no means of ob-

taining information, we must, unless we are kept informed by Germany of any new developments there, send ships ourselves to see that our interests are not prejudiced" [15]. The assumption was that Germany had to be watched carefully.

On 21 July, Lloyd George, then British Chancellor of the Exchequer, delivered a historic declaration at the Mansion House (the official residence of the Lord Mayor of London). There is a controversy in the British historiography as to whether the speech was a warning to France or to Germany to the effect that Britain voice in world affairs should not be ignored. It was clear that the speech "was no sudden inspiration but a carefully thought out one", according to the Foreign Office official Arthur Nicolson [16]. It indicated to the Great powers that Britain had to be consulted [17]. At the same time, Lloyd George gave a warning against further German expansion. "But if a situation were to be forced upon us in which peace could only be preserved by the surrender of the great and beneficent position Britain has won by centuries of heroism and achievement, by allowing Britain to be treated where her interests were vitally affected as if she were of no account in the Cabinet of nations, then I say emphatically that peace at that price would be a humiliation intolerable for a great country like ours to endure" [18]. On the same day, the Cabinet met again and decided that Britain "should recognize no-resettlement of Morocco in which we had not a voice."

The speech was followed by angry reactions in Germany during the next week. Germany accepted the British public declaration as provocation and a threat, which could lead to war. The result was a sharp turn of Anglo-German relations for the worse. During the next months, Anglo-German relations became more strained than ever before. Germany accused Britain of an unnecessary and dangerous involvement in Franco-German dispute.

Meanwhile, a verbal *modus vivendi* was concluded on 26 July between the French Ambassador and the Spanish Foreign Minister at San Sebastian. The *modus vivendi* was regarded by the Spanish Government as a recognition by France of their contention that El Kasr and Larache laid within the Spanish zone. It was in any case effective in preventing for some time the recurrence of regrettable incidents. It thus paved the way to a resumption of the conversations, interrupted since the beginning of June, concerning the relations between the French and Spanish spheres of influence in Morocco. A proposal to that effect

was put forward by Spain on 7 August. The following day an interview took place in London between the King of Spain and Edward Grey. Britain was assured that, notwithstanding all that had happened at Larache and El Kasr, Spain might still reckon on the friendly sentiments of England. It was held, however, both in Paris and London that the Franco-Spanish conversations had better stand over till something had been settled at Berlin [19].

During August, the Anglo-German tension abated as signs appeared that Germany and France might reach a satisfactory agreement. However, the combative attitude of the Foreign Office officials did not change. Military planning was underway and arrangements between the general staffs of France and Britain were discussed. Nicolson wrote an interesting account of the situation: "In fact, I believe they [Lloyd George and Winston Churchill] were a little disappointed that war with Germany did not occur. Winston came to see me every morning and Lloyd George came once, and I was struck by the determination of both of them, not to permit Germany to assume the role of bully and at their belief that the present moment was an exceedingly favourable one to open hostilities" [20]. During September, there was a constant expectation of a war with Germany [21].

Gradually Franco-German difficulties over Morocco moved towards a solution [22]. By 10 October, the final draft of Moroccan convention was drawn up and the Franco-German negotiations ended on 22 October with the final settlement of the main boundaries of the French Congo. On 4 November, the Franco-German agreement was signed at Berlin [23]. Under the convention Germany accepted France's position in Morocco. As compensation, Germany gained 275,000 km² territory in the French Equatorial African colony of Middle Congo. The territory became a valuable addition to Germany's colonial possessions as part of her colony of Kamerun.

Thus, the trouble over Morocco ended without war, partly due to the British efforts.

The German public opinion was completely unfavorable to the arrangement. The violent language used against the arrangement produced the impression that Germany had suffered a diplomatic defeat, as the position gained by France in Morocco was in no way counterbalanced by the concessions obtained in French Congo.

AFTERMATH

The next step was the achievement of a special arrangement between France and Spain concerning France's position in Morocco. Edward Grey's instructions on this point were categorical: the French Government had to understand that the establishment of a strong naval Power on the Atlantic coast in the place of Spain would strike at one of the fundamental conditions of the entente with France. On 2 November Francis Bertie made clear to the French Foreign Minister that such an arrangement had to be based on the 1904 treaty, and not on the recent suggestions put forward by M. Regnault [24].

In December, three meetings were held at Madrid between the Spanish Minister for Foreign Affairs, and the French Ambassador Geoffroy. By the end of the year there was little prospect of a settlement being reached. Spain regarded the French proposals as being designed to keep a strong French control over the Spanish zone. She felt humiliated by the suggestion, put forward by the French press, that the northern zone would be merely leased to Spain, under conditions depriving her of the free action, which she claimed to exercise in it under article 3 of the convention of October 1904.

The Franco-Spanish dispute actually ended in March 1912, when the Moroccan sultan abdicated after signing the Treaty of Fes. The treaty formally ceded Moroccan sovereignty to France, transforming Morocco into a protectorate of France.

CONCLUSION

During the Agadir crisis, Britain decided to interfere in order to encourage France and Spain first and then France and Germany to settle the Moroccan issue. While throughout the first part, she was somewhat cautious and reserved, through the rest of the crisis period she took a more determined line, indicating to the three powers that she could not be excluded from the world affairs. Remaining loyal to the Entente, Britain began to review her military capacity should the conflict develop into war. Due to her efforts, the conflict over Morocco ended without war. The resolution of the crisis was of outstanding importance, as it marked the end of one of the most dangerous moments in the last decade of peace before the First World War.

NOTES

[1] Memorandum on the Present State of British Relations with France and Germany by Mr. Eyre Crowe, January 1 1907, G.P. Gooch & Harold Temperley eds., *British Documents on the Origins of the War 1898-1914, Vol. III The Testing of the entente 1904-6*, London, 1928, p.403.

[2] *Ibid.* p. 417.

[3] Jeffrey Dunn, *The Crowe Memorandum: Sir Eyre Crowe and Foreign Office Perceptions of Germany, 1918-1925* (Cambridge Scholars Publishing, 2013), p.47.

[4] Parushev P. "The Balkan countries between the rivalry and the rapprochement (1908-1911)"//*Annual of Assen Zlatarov University-Burgas*, 2015, T.44 (2), pp.38-44; Yovcheva G., P. Peeva, P. Parushev. *Evropeiskite sauzi, Bulgaria I Balkanite, 1870-1918* (Burgas, 2015), ISBN 978-619-7123-26-5.

[5] Franco-German Convention of February 1909 was understood to have finally settled the questions between France and Germany based on French political preponderance in Morocco within the limits of the Algeciras agreement.

[6] G.P. Gooch & Harold Temperley eds., *British Documents on the Origins of the War 1898-1914, Vol. VII*, p.299-300.

[7] *ibid.*, p.302.

[8] *ibid.*, p.304.

[9] *ibid.*, p.305. Spain insisted: 1) on having full control on the railway section of the Tangier-Fez railway passing through her zone; 2) cooperation between Spanish and French legations at Tangier; 3) equality of Spanish and French language usage; 4) advancement of the second period of the secret Franco-Spanish convention, so that Spain might have freedom of action in her zone; 5) extension of police forces under Spanish and French control.

[10] *ibid.*, 287, 291-2, 295.

[11] *ibid.*, 322.

[12] "Two War Clouds Menace Europe". *The New York Times*. 6 July 1911. Retrieved 25 November 2019.

[13] *British Documents on the Origins of the War...*, *ibid.*, 331-358.

[14] *ibid.*, 337.

[15] *ibid.*, 378.

[16] *ibid.*, p. 396-7.

[17] Richard A. Cosgrove, "A Note on Lloyd George's Speech at the Mansion House, 21 July

1911" *The Historical Journal*, Vol. 12, No. 4 (Dec.,1969), pp. 698-701.

[18] David Lloyd George, Mansion House Speech, 21 July 1911, from *The Times*, London, July 22, 1911, p.7.; See also Timothy Boyle "New light on Lloyd George's Mansion House Speech", *The Historical Journal*, 23, 2 (1980), 431-433.

[19] *British Documents on the Origins of the War...*, 310.

[20] Cosgrove, *op. cit.*, p.700.

[21] Nicolson, *Portrait of a Diplomatist*, p. 252-3.

[22] *British Documents on the Origins of the War...*,285.

[23] *ibid.*, 576.

[24] *ibid.*, 583-7.

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BULGARIAN SCHOOLS IN HUNGARY (1918-1944)

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ABSTRACT

The article analyzes the state of the Bulgarian school education in Hungary from 1918 until 1944. A periodization of its development from a historical and pedagogical point of view has been made. Archives of teachers and students in Bulgarian schools in Hungary have been studied.

Key words: Hungary, Bulgarian schools, teachers

Introduction

There were Bulgarian schools established by the Bulgarian community in Banat and Transylvania in the Austro-Hungarian Empire. After its collapse and under the new political circumstances, the community of emigrants from the second emigration wave found themselves within the borders of Romania, Serbia, Hungary, and Slovakia. Meantime, a new community was formed, and it began to settle in the territory of present-day Hungary after the 1970s. They represented the third emigration wave and laid the foundations of Bulgarian education in Hungary during the first decades of the 20th century.

Schools

In February 1918 the first Bulgarian school on the territory of the newly established Hungarian state was open in Budapest. Diplomat Ivan Stojanovic-Aggeleto [1, p. 5] and the representative of the Bulgarian ecclesiastical community, Father Boris Simov, a future bishop of Nevrokop, who had defended his doctoral degree in theological sciences, contributed for the opening of the school [2]. The regulation of Church and School Affairs of the Bulgarian Colony in Hungary stated that with the assistance of the Bulgarian Legation in Budapest a teacher should be appointed in every city where at least 20 Bulgarian families lived and where there were at least 10 children [3, p. 68]. It was planned that every Bulgarian church should have a primary school.

As the Bulgarian Diaspora was grouped around major centres such as Budapest, Miskolc and Pécs, it was there that efforts were made to set up schools to teach in Bulgarian. Thus, in 1924, a school was established in Miskolc, and in 1939 in Pecs [4]. In 1940, a Bulgarian school was established in the town of Kassa, now Košice, Slovakia [3].

Facilities and financial conditions

Funding for these schools should be a priority for the state, but it did not always keep its engagements strictly. None of the schools had its own building during the mentioned period. After it was founded, the Bulgarian School in Budapest remained in the building at 4 Lonyay Street for four years. This was followed by a long tenancy at 20 Jozsef Street [2]. In accordance with the changes in the Bulgarian educational system (7th grade became the compulsory primary education in Bulgaria in 1921), it also started a secondary school class. Its official name during this period was Budapest Bulgarian Primary and High School. In the early 1920s, a Hungarian language teacher was also appointed [2, 3].

The Bulgarian School in Miskolc was accommodated in a private house. The students' parents made the desks, the chairs, and the blackboards themselves [3]. From 1930 until 1934, the Ministry of Foreign Affairs closed the teaching position and the Bulgarian community paid the teacher's salary. The situation in Pécs and Košice was the same. The schools relied

mainly on donations from the Bulgarian community and private houses to teach their students.

Teachers and students

The first headmaster of the Budapest school was Kostadin Spirov [2, 3] (in some sources referred to as Konstantin Spirov) [2]. He found and enrolled the first students, some of whom attended Hungarian schools and came to the Bulgarian school for further studies. In his correspondence with Consul Ivan Stoyanovich Spirov wrote that their command of the Bulgarian language was catastrophic: few knew Bulgarian, some spoke Croatian and some others could not speak the language of their grandfathers [1]. Non-verbal communication was required in order to understand the instructions given by the teacher.

Dr Nikola Milev was also a headmaster of the Budapest School. He was known to have graduated from the Plovdiv Seminary and the Theological Academy in Sofia. He came to the Hungarian capital in the early 1930s and worked at the school until January 1935. After two terms in Miskolc and Kasha (Košice) he returned to Budapest again [2]. During his stay in the country Nikola Milev learned Hungarian, which contributed to maintaining good contacts, and turned the school into a true cultural institution. In 1941-1942 a People's University was established in it and talks on various topics were presented [2]. A library was also established. In 1934 it had only 14 books, and in 1937 – 378 books [3]. A fund for poor students was set up. These ardent activities resulted in an increased number of students and teachers, despite the restrictions imposed by the war (see Table 1).



The Budapest Bulgarian School



In the classroom

Table 1. Number of teachers and students in the Bulgarian school in Budapest (1918-1944)

School year	Teachers	Students
1917/18	2	18
1918/19	2	23
1919/20	1	22
1920/21	2	35
1921/22	3	40
1922/23	5	41
1923/24	5	26
1924/25	4	26
1925/26	3	30
1926/27	1	14
1927/28	4	13
1928/29	2	19
1929/30	2	19
1930/31	2	18
1931/32	3	19
1932/33	5	27
1933/34	3	25
1934/35	3	27
1935/36	4	36
1936/37	4	41
1937/38	5	37
1938/39	4	51
1939/40	5	52
1940/41	4	37
1941/42	4	40
1942/43	4	44
1943/44	5	52

Note: In 1944/45 the school in Budapest was closed.¹

Another name standing out in the Association of Teachers is that of Todor Popnikolov. He was the headmaster of the Košice school, set up with

¹AMVnR, op.3, a.e.359, l.46.

the assistance of Bulgarian ambassador Stoil Stoilov and the efforts of Bulgarian gardeners and their relatives [2, p. 72].

The Miskolc School opened in 1924 with 12 students. During the 1932-1933 school year the number of students remained almost the same. They were 14, distributed as follows: first group 5 students, third group 4 students, first class 4 students, third class 1 student [2, p. 72].

During the 1934-1935 school year, there were two teachers and their salaries were paid by the Ministry of Foreign Affairs. From 1943 until 1950 the school was closed. There is no information about the number of pupils in the school in Pécs. It is believed that it existed in the form of a Sunday school, where the students studied Bulgarian language and literature, history, geography, and theology [5]. After World War II, a primary school was mentioned in the records, which was a branch of the school in the Hungarian capital. Information about the Košice school is also scarce: it is known that it opened on March 6th, 1940, with 25 students attending [2, p. 72].

After the end of World War II, a number of changes were made, stemming from the new socio-political conditions in Eastern Europe. Before the 1948-1949 school year ended, the headmaster of the Budapest school, Nikola Milev, was declared an "enemy of the people's democratic government" and fired, and a substitute was not appointed. Bulgarian university students had to teach some of the classes [3].

Conclusions

Systematic data about the history of the Hungarian school system from 1918 to 1944 help to distinguish the following periods:

- 1918-1924: rise and functioning of the first Bulgarian school;

- 1924-1940: the appearance of Bulgarian schools in other cities which were centres of Bulgarian colonies. They subsequently became branches of the Bulgarian school in the capital;

- 1940-1944: struggle for survival during the Second World War, in which both Hungary and Bulgaria took part.

The following regularities are observed: The close connection between church and school, which led to the establishment of common boards of trustees and the recommendation that the teachers sent by Bulgaria had to possess singing talents and skills so that they could be church singers, was an important feature of the development of the educational process. The number of students in primary schools and affiliates varied due to the economic crisis in the 1930s and the hostilities in the 1940s, which forced their families to relocate.

The establishment of Bulgarian schools in Hungary was a patriotic aspiration of the Bulgarian community, which wanted to keep the language and native traditions alive. In this endeavour both material resources and spiritual potential were invested.

The state had no systematic policy regarding the education of Bulgarians outside Bulgaria and in 1918-1944 provided incidental financial resources and qualified personnel for the Bulgarian schools in Hungary.

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THE FORMATION OF INFORMATION CULTURE AND SECURITY FOR THE USE OF ICT BY ADOLESCENTS THROUGH THE INTERACTION OF EDUCATIONAL AND FAMILY ENVIRONMENT

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ABSTRACT

The most effective means of the information security of a person is the high level of information culture. The issue of information culture has become especially relevant due to UNESCO transition from the information society conception to the knowledge society conception, where the knowledge is a strategic resource because of information processing. Development of information culture is currently considered as one of the key purposes of modern education. Its successful achievement in the educational process determines whether a person is able to effectively interact with the modern information space.

Key words: *information culture, information security, competences, children and adolescents, pedagogical technologies.*

INTRODUCTION

A fundamental characteristic of modern society is the increasing role of information. The expansion of the scope of application of information and telecommunication technologies in everyday human life has given rise to the new category of “information culture”. At the same time, information culture acts as the most important component of the spiritual culture of the society as a whole, the various social groups, the individual. The latter necessitates the study of information culture, acting as a set of universal values that ensure the development of the cultural potential of society. Thus, it is important to note that it is not quite correct to correlate information culture only with the processes of computerization and development of information technologies. It is clear that the information culture is not limited to this, but also determines the value of information and opportunities for the development of society as a whole and the individual in the context of expanding knowledge and new technologies of search, processing, exchange, preservation of the information etc.

It is important to note that in modern society there is a struggle of two trends: on the one hand – the development of creativity, talents, initiative, on the other hand – accuracy, correctness and consistency in working with information. At the same time, creativity is also manifested in relation to the work with the general flow of

information, when there is a need for the manifestation of creative abilities, thanks to which information self-regulation systems are created. It is obvious that the attitude of the individual to the information, abilities, skills and readiness to operate correctly with it are in the focus of consideration of the pedagogical community and are closely related to the understanding of information culture as an object of research of pedagogical sciences.

EXPOSITION

The information culture thus appears as a goal-setting component of identity formation of the adolescent learners, able and willing to operate with information flows, has shaped ways of handling and processing information rationally, are willing to encourage and support the work with information, meeting the needs of society.

In this context, education performs the main social function - the formation of the abilities of future graduates of educational institutions that would meet the relevant needs arising in the modern information society. This confirms the relevance of the research aimed at studying the development of information culture of the adolescent learners based on training methods of information processing.

In general, the graduate of educational environment should have a developed information culture that provides not only the process of operating information flows, but also assumes the achievement of technical and psychological pre-

paredness in working with information. Above, we focused on the fact that information culture is an important phenomenon, not limited only to technical skills of working on a computer, but we emphasized that the possession of modern computer technologies is an important element of information culture, its component.

The information society intensifies the contradiction between man and information environment. The objectives of the development of information culture of the learners allow the adolescents to reduce this discrepancy through the development of ways of handling information, skills of processing and use. At the same time, an important component is the psychological stability of the person to the enormous flow of information, inattention to which causes specific socio-psychological consequences.

Thus, the psychological component of the development of information culture of children and adolescents is directed on formation of such personal characteristics, which provide preservation of optimum functioning of mentality in the conditions of stressful information influence. The development of the information culture as a pedagogical process correlates with the actualization of emotional, volitional, intellectual, motivational spheres of personality that affect the flexibility and mobility of the psyche in the processing of information. Paying attention to this, let us consider the definition of information culture in general and from the point of view of pedagogical technologies.

By analyzing the work of different authors, it can be noted that information culture is an independent area of the general culture of the person as a whole. Its exact expression is seen in the interaction between each individual, the information environments surrounding it and the space as a whole. In other words, the information culture is understood as a set of knowledge, skills and abilities to work with the information found with the use of modern information technologies, where the main components of information culture are information and computer literacy.

That assumes the presence of specific knowledge, skills and abilities to find the necessary information, the methods of storage, a competent use, the transformation and creation of new information, using the new information technologies. Possessing information skills and abilities requires accurate identification of the information needs of adolescents, which are at the heart of the effectiveness of information se-

curity. For this purpose, the sources of information used should be identified and evaluated by adults. The information is first analyzed, synthesized and interpreted correctly and critically. The search for the most reliable and complete sources of information is of particular importance for qualitative perception. A high level of human information culture also guarantees the probability of choosing the right information.

In this regard, the formation of information culture of the individual is at the present stage one of the priorities of the state educational policy and the most important task of the pedagogical process. This problem has become particularly relevant in connection with the transition of UNESCO from the concept of the information society to the concept of the knowledge society. It should be noted that the concept of the information society focused on the universal availability of information provided through the introduction of new information and communication technologies. Then it soon became clear that the sheer abundance, diversity of information received, as well as the speed of its delivery is not a guarantee of awareness and competence of the individual and society as a whole. On the way of transformation of information into personal knowledge, there are barriers, the most important of which is connected with insufficiently high level of information culture of the person that is with inability of the person to find, select, and analyze the received information. Taking into account the importance of this problem, UNESCO formulated the concept of a knowledge society. Knowledge is a strategic resource as a result of processing (selection, analysis, synthesis) of information, and the high level of information culture is a means of ensuring information security of the individual, as the most important condition for successful professional and personal development. Later, the fundamental statements of the concept became the basis of the National Strategy for the effective application of information and communication technologies in education and science of the Republic of Bulgaria (2014-2020). [1, 2]

Today we are increasingly aware of the need to solve the global problem to prepare children and adolescents in a timely manner for new living conditions and professional activities in the information environment, to teach them to act independently in this environment, to effectively use its opportunities, to be able to protect themselves from negative influences.

SURVEY, RESULTS AND CONCLUSIONS

To successfully solve the problem, an empirical study was conducted. The main purpose was to analyze the knowledge about the factors and prevent the risks associated with the use of ICT, as well as to create a safe information environment for adolescents. Based on this, to approve the methodology achieving the information culture, It is necessary to identify the factors that determine the selection of ICT that guarantee social security.

The survey was conducted among 145 adult respondents, including 78 parents and 61 teachers. The period of the study was from September to October 2019 in the cities of South-Eastern Bulgaria. Questionnaires were distributed at the place of residence, work, in the immediate environment. Respondents were familiar with a questionnaire and instructed to follow the instructions provided in it. The participation in the survey of adults of different age and sex structure, different place of residence and work, the direction of the sphere of professional interests, allowed to ensure the representativeness of the survey and reflect the views of different segments of the population on the issues raised. The main contingent of respondents were residents of regional centers of the area region - 59,32%, the residents of small towns – 26,92 %, and villages – 14,76%, respectively made up of the total number of respondents. The largest number of participants in the survey is represented by people of mature age (over 40 years) – 53,39%, people aged 25 to 40 years (32,28 %) of the respondents, and the young people under the age of 24 years (15,33 % of respondents). Most of the respondents (72,22 %) defined their occupation as "related to the problems of education". The survey was based on the hypothesis that the main factor in the development of information culture is education. Therefore, the process of forming the foundations of information culture is impossible without the guidance of the adults, whose tasks are to create such an information and educational environment that would lay the potential for enriched development of the child's personality and prepare him for life in the information society. Thus, with the questionnaire for the effective formation of information culture and ensuring the safety of children and adolescents, has been set the tasks of understanding the direction of informatization of the educational process and the formation through the informati-

zation of pedagogical activity of a single information space in the school and the family. It was taken into account that the process of creating a unified information educational environment will provide:

- the development of information culture of all participants of educational process;
- increasing the competence of teachers in the field of ICT application;
- the formation of parent`s information culture as one of the conditions for ensuring the safety of children;
- the change of character and orientation of interaction of participants of educational process;
- strengthening cooperation between parents and the educational institution to improve the educational process on child safety;
- increase the creative potential of children, the development of their readiness to learn in a school environment.

In this regard, the questionnaire contained 15 questions from six directions in the following areas:

- * the degree of security and integration of ICT in the processes of education and upbringing in the educational and family environment;
- * the influence of information and educational space on interests and values, orientation and development of children and adolescents;
- * the organization and place of process of formation of bases of information culture and safe use of ICT by children and pupils;
- * the knowledge and compliance with information security rules and regulations when working with ICT from adults and children;
- * the activities and forms of development and improvement of information literacy, competence of adults and children in the safe use of ICT;
- * the awareness of the risks and threats to the health of the ICT user, symptoms and measures to prevent the computer addiction, in the context of an excessively long time a work with them.

The responses showed a difference in the motivation of the adults - teachers and parents, to choose information for the use of ICT. The desires, preferences and interests of parents and adolescents coincide to some extent, but this is not enough. The formation of information culture of ICT use begins with the development of critical thinking and responsibility for their behavior in front of the computer. Only then are habits developed to adhere to the rules of the safe Internet.

The range of questions to the respondents to determine the extent of the spread and application of ICT in the processes of education and upbringing in the educational and family environment required a choice of answers from 7 proposed closed and one open options. Answers allowed establishing with 62 % of availability and wide access of children and pupils to modern communication technologies and equipment in a family and educational space, used with more than 70% of cases for computer games, communication in social networks, viewing of cartoons, movies, listening to music, etc. At the same time, the guidance of adults the computer-gaming and entertainment activities of children is insignificant. Only 13.5% of adults provide direct assistance, direct the fun, and play activities of their children using collaborative play. The remaining 86.5% of adults go about their business and do not interfere with the game

play. Up to 30% of the respondents use ICT for educational activities and additional information for the accumulation of new knowledge and self-development. From the data obtained, it is clear that the children from a very early age have virtually unlimited and free access to various modern ICT tools without prior knowledge and training in a certain culture of their safe use. This leads to a distortion of children's perception of the real meaning, place and functionality of modern technologies, limiting them only to the entertainment function, which does not bring significant benefits in the further development and education of children, as well as their professional development in the future. Further, when forming the foundations of information culture, it is necessary to take into account the high availability of ICT tools and the availability of practical and intuitive skills of using technical means in most modern children. Therefore, work with them should be based more on the information component and the culture of ICT use in general.

The analysis of the adults' responses to the influence of information and educational space on the personality of a teenager showed the following:

35% positively perceive and understand the nature and extent of ICT impact; about 30% are both positive and negative about their children's work with the computer, and the remaining 35% negatively assess the use of new information technology products in children's education. The received actual data confirm the remarks established earlier in similar surveys. The data show that it is inexpedient to use products of technical

development of society, computer technologies, various devices of communication and new technologies in education of children without explanation of their place and value for society, their functional characteristics and certain technique of safe use, the psychological protection from destructive information.

The children of the digital society must master the new concepts, tools and competencies generated by ICTs and be aware of their advantages, opportunities, limitations, their causes and consequences.

The next set of questions concerned the responsibility and functions of social institutions in ensuring information literacy of adolescents. The respondents' opinion was in line with our expectations that prior training and skill development are necessary for the correct selection of information, the formation of information culture and competence for the safe use of modern ICTs. This requires timely diagnosis of harmful information for the physical and mental health of adolescents.

Naturally, the implementation of the processes of information culture formation was associated mainly with the organization and conduct of training in the educational environment by the computer science teachers, specialists, class teachers - 78%, the parents -18% joint efforts of the school and family - only for 4% of the respondents.

Another series of questions to respondents revealed the level of knowledge and continuous implementation of standards and rules of information culture and safe use of ICT by participants of the educational process. Up to 40% of them confidently and consciously comply with these standards, and the remaining 60% - satisfactorily or poorly. This position puts forward the need to plan the personal trajectory of ICT competence and the continuous improvement of skills in the field of information technology for the teachers of educational institutions and for the parents of children and adolescents. Such a statement will provide an understanding of the place, meaning and function of ICT in children's lives and will allow:

- to stimulate their cognitive activity and help them in motivated development of new knowledge and its expansion;
- the children to get basic skills and information activities;
- to use the capabilities of modern ICT tools in a variety of activities without compromising the mental and physical health of adolescents.

The answers to the next set of questions concerned readiness and participation in activities and forms of education, development and improvement of information literacy, competence of adults and children in the safe use of ICT. The data obtained confirm positive adoption and attendance of information and educational measures – about 40% of respondents; about 30% of respondents report with regret that these activities are limited, i.e. only once a year; up to 24% – relying on them selves and are not interested in it; and the remaining 6% – are not informed, but support and would participate if they knew. Thus, the results of the survey indicate the need for:

- Organization of permanent training: problem lectures, seminars, consultations, discussions, round tables, for teachers and parents;
- Conducting lessons (class hours, games, trainings, quizzes, contests, lessons of informatics and information technology) with adolescents in order to form an information culture;
- Participation of adults and children / pupils in joint activities and forms, projects on the problem of formation of safe use of ICT.

In addition to the previous questions to clarify the knowledge of the adults about the risks and threats to the physical and mental health of children, the user of ICT in general, in conditions of excessive time spent on the computer, the symptoms and prevention of computer addiction were asked the next questions. As a result, it became clear from the answers that the majority of respondents (up to 86.5%) are aware of the essence and extent of the positive and especially negative impact of ICT tools and products of the information society on modern children/adolescents, and are familiar with both the general features of computer addiction and measures of its preven-

tion and eventual prevention. However, the ability to adequately respond and confront possible threats in a virtual environment is quite low due to the lack of methodological competence, experience and maturity.

The remaining 13.5% of the surveyed users use ICT for family education and upbringing. As a result, a conclusion can be made that most parents are aware of the need availability for information culture. The modern technologies replace direct communication between the child and the parent. There is no adult control over the choice of sites, partners, the nature of the child's contacts with other important people for his communication. The consequence of children imitating Internet heroes is the wrong motivation of behavior choices and the inability to limit their dependence on ICT. In this case, adults are useless for the socialization and development of their children, because they do not control their interests and activities.

In general, the survey and its results confirmed the need for multifaceted work to improve the competence of teachers and parents in the field of information culture and the safe use of ICT in the educational process.

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CLINICAL SOCIAL WORK - THEORETICAL ASPECTS

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ABSTRACT

This paper analyzes some theoretical aspects of the clinical social work. Its content is discussed, as well as some clients' specific characteristics. A brief literature preview is done. It occurs that this is an actual theme in the context of 21-st century when helping professions, helping behavior, altruism and positive communication are concepts with practical meaning that concern more and more people. Methods of clinical social work are applicable in social work as well, but the dialogue with clients requires special skills, specific attitudes and professional experience. Not only clients are object of clinical social work, but also their families, relatives, friends, partners. It is very difficult all patients to be reached by social workers, because some of them are swallowed by pain, fear, deny, anxiety. Their feelings are ambivalent because they have to reveal them before a stranger. The main purpose of the clinical social work is not to calm down patients, but rather to show empathy and to strengthen their efforts and reserved resources, so to improve their lifestyle and to help them to step out of the crisis situation this time and every time after.

Key words: *clinical social work, psychosocial intervention, methods of social work, reserved resources, empathy, and lifestyle.*

INTRODUCTION

This article faces the problem about theoretical aspects of clinical social work. The various dimensions and directions in the application of clinical social work are discussed, as well as the intersections and points with psychosocial rehabilitation and psychology in particular.

A number of authors examine the nature of clinical social work in theoretical and in practical aspect. There are practice-based evidence that it works. Generally, and based on the definitions adopted, there are several major areas in which clinical social work, as a field in the assisting professions, can be emphasized and highlighted:

- *it helps changing the client by developing his or her skills in coping with difficult life situations;*
- *facilitates the adaptation process;*
- *enhances the client's potential to lead an independent life;*
- *enhances the quality of its biopsychosocial functioning;*
- *harmonizes the experiences and reactions of the individual;*
- *works towards improving the relationship between the client and the others: his family,*

relatives, friends, partners, colleagues, other acquaintances;

- enhances the patient's faith in his or her own strengths and capabilities [7, p. 6].

Some authors even examine the impact of clinical social work on enhancing the client's emotional intelligence in order to adequately dealing with the inconvenience of the situation created [3].

According to G. Hadjiiski, clinical social work is aimed at assessing and supporting the process of dealing with a number of psychosocial challenges related to the disease and the changed social status of the individual living with the disease [12].

In recent decades, according to the author, hypotheses have been made public that serious illnesses involve only a part of the human personality, and in this sense the personal resources are not adequately used to deal with the consequences - physical and mental, of the disease.

In this regard, it is appropriate to apply a new therapeutic approach to the ill person, within which he or she is an active part in the healing process.

Clinical social work provides an opportunity to overcome some of the negative psychosocial

aspects of the disease-personality-society relationship, an optimal, holistic approach to treatment and social medicine.

Clinical social work is responsible for meeting the specific psychosocial needs of certain persons suffering from severe, disabling, chronic diseases [12].

Some authors emphasize that it is very important to make a difference between the professional roles of:

- the social worker;
- the social pedagogue;
- the clinical social worker.

In addition it is quite necessary to approve standards for their training and professional qualification [1, p. 45].

A successful model for training relevant professionals is the so-called. "field practice" targeting children and adults with disabilities, which is used in bachelors in social work. During this practice, students have the opportunity to become familiar with the priority basis of clinical social work, because it is oriented to practical problems relevant to both social work in general and psychology and medicine. As a result, students are given the opportunity to build skills for support, teamwork, collaboration, as well as purposeful tracking of clients' physical and spiritual condition, the purpose of which is:

- enhancing their psychic potential;
- enhancing their adaptive capabilities;
- achieving more harmony in their mental development;
- adequate customer health care;
- psycho-physical and social rehabilitation [8, p. 38].

It should be absolutely clear what role is performing every specialist. Team work in clinical social work means allocation of responsibilities and doesn't mean transfer of responsibilities and professional tasks.

Psychosocial adaptation after a disabling illness

Social adaptation is a process that a person goes through repeatedly in his or her life path and is dictated by the corresponding social change that necessitates it.

In a more general context, adaptation is associated with changes in attitudes and individual behavior, personal priorities, and the specifics of social functioning in a crisis situation for an individual [17]. In some cases, social adaptation is a process that should be facilitated by

a specialist, who is in possession of knowhow about the process and its really serious, deep consequences.

Main reason for the adaptation process is "the state of maladaptation that precedes in time and is a disorder in the interaction between the individual and the environment, threatening either with the breakdown of the relationship or with the impairment of significant properties and characteristics of the person, without which it will be seriously damaged, and it will not be the same" [2, p. 195]. Disadaptation can be due to a number of specific circumstances, from which the outcomes can be very different.

Disadaptation could be a result of long-term social exclusion of community due to different reasons. Such a human state may be overcome only with very patience, understanding, empathy, tolerance.

In a person's life, events occur, critical in their nature and serious consequences, and therefore necessitate some change in his psycho-social functioning. They require the mobilization of individual resources to deal with them, as well as the subsequent adaptation process. Some of the crisis changes are predictable and expected, such as the transition from one stage of development to another, while others happen unexpectedly and completely change a person's life course without being prepared for how to adequately respond to what is happening.

Such an event is the diagnosis of a life-threatening, chronic disease. In this sense, the need to adapt to the new life situation caused by the state of maladaptation as a result of the disease serves to preserve the homeostatic balance of the body in response to the threat, as interpreted by chronic diseases.

The complexity of the process of adaptation to the new life situation of parts is due to the sudden disruption of the normal functioning of the individual, the need to change life plans and organize daily life in accordance with the long-term treatment process, accompanied by some social isolation due to physical and psychological difficulties.

Disturbances in the social functioning of the individual can be caused by various causes, some of which are:

- developmental disorders [7, p. 7];
- age factors: aging, impaired cognitive and physical status, dementia, depression, social exclusion, loneliness [6];
- functional disorders that lead to psychosocial consequences and manifestations

and to changes in the level and quality of autonomous functioning [9, p. 36].

As per L. Novocad, social inclusion is considered as "a process of removing obstacles in the inclusion of individuals and groups into the society; enhancing the elements of solidarity; reciprocity; co-responsibility; as well as common sharing and assumption of social cohesiveness" [19, p. 19].

In this context, adaptation to a changed social reality should rather be seen as a crisis life situation, which requires the search for an individual solution to a multidimensional problem with a high psychological "cost".

In research on the characteristics of mental and social functioning in severe and chronic illness, the terms "adaptation" and "adjustment" are often used synonymously to describe the adaptation process. From the point of view of medical practice, psychosocial functioning with a chronic illness, to which the group according to P. Larsen refer to malignancies, the term that best describes the peculiarities of the process and changes occurring in a person's life as a consequence of illness is adaptation [15]. It is regarded as a multidimensional process involving interpersonal and interpersonal dimensions interrelated [15, p.44].

The socio-psychological perspective implies an emphasis on the psychological adaptation to change in the individual and interpersonal functioning of the individual as a consequence of the disease.

Adapting to a life with a chronic illness or a serious diagnosis involves considering it as a holistic process in which the various spheres of personality (physical, emotional, cognitive, social, behavioral) mutually influence and change, implementing effecting change in the relevant social context. Therefore, the difficulties in any sphere of personal functioning will affect the adaptation process in other spheres [Hoyt & Stanton, 2012 quoted by Larsen, 2008, p.44]. At the same time, the basic characteristic of the adaptation process is the individual perspective of what is happening [15, 2008, p.45].

Despite of the subjective perspective on the degree of realization of this complicated process, the suffering person needs complex professional support to help him or her successfully adaptation to the new reality of life.

An important factor that motivates the deliberate efforts of skilled specialists in this area is to achieve and maintain an optimum quality of life after illness in the circumstances.

The "quality of life" construct in medical research indicates the quality of life resulting from an individual's health status. According to the World Health Organization's definition, *"health is not only the absence of illness or infirmity, but also a state of physical, mental and social well-being"* [21].

E. Person (1994) defines quality of life as *"a multidimensional construct that integrates personal perceptions of the individual's physical, emotional, social and cognitive functioning, as well as the negative aspects of somatic discomfort and other symptoms specific to the disease and the effects of its treatment"* [16, p. 32].

Beyond the strict definition of quality of life in a disabling illness, one of the main tasks of the adaptation process is to resume or at least to move closer to the typical lifestyle and social functioning of each person in the society. One of the most significant indicators of adaptation to the new situation is the return to normal daily duties, as well as the reintegration into society after the healing process, which presupposes normalization of the individual's mental balance.

The realization of these tasks is not always possible because of the specifics of the suffering person and the consequences for the individual of it. The sense of well-being is subjective and inherently a multidimensional construct that integrates emotional responses and cognitive appraisal of life satisfaction [Diener et al., 1999; Veenhoven, 2000; quoted by Tair, 2011, p.13]. For this, each individual will reflect on their experience of the disease in a very subjective way.

At the same time, the lack of a well-developed social network to support the afflicted individual, as well as the lack of awareness of the existing options for specialized counseling and therapeutic care offered by the available rehabilitation programs make it difficult to adapt individually to life with a serious, life-long, chronic illness.

The specifics and multidimensionality of the difficulties faced by people with disabilities form the need for comprehensive specialized care and support for the process of individual adaptation, taking into account the totality of factors that affect its effectiveness [20].

Helping people with such kind of problems is a very difficult task, because requires a lot of recourses (time, specific skills, patience) which are not appropriate for any helper. So help provided should be a professional one.

Disability and adaptation opportunities

The problem of disability, temporary or permanent, after severe mental or physical illness requires a two-dimensional analysis:

- on the one hand, from the position of the society and its perception of disability;
- and on the other hand, through the prism of the suffering person and his / her psychological disability.

Disability as a result of mental or somatic illness is one of the most severe consequence that have an adverse effect on the social functioning of the individual. Depending on the extent of the damage caused by the disease and the side effects of therapy, the temporary or permanent incapacity of the individual is determined, which directly correlates with the need for labor and social readaptation of the suffering person and his/her family.

The general definition of disability as a "social construct that associates a specific social status with many different difficulties and challenges in a social context" is rather introductory, since it does not provide sufficient opportunities for its in-depth study and search for solutions to this "social fact" problems in social policy and practice [4].

According to B. Ivkov, the misuse and widespread use of the concepts varies greatly depending on the social context. This in turn predisposes to errors and semantic ambiguities leading to misunderstandings and misconception. When it comes to disability and the legal regulation of social relationships that result from its existence, misuse of the concepts can lead to serious misunderstandings, even if conditions for stigma and discrimination arise [5].

According to V. Finkelstein, the opinion in society is that people with a disability are heavily dependent on the help of others. Finkelstein calls this a "**disability paradox**":

- *disability implies personal tragedy, loss, temporary or permanent irreconcilability for working and, consequently, dependence on social support;*
- *but on the other hand, disability is a factor in group discrimination on the part of the healthy society.*

The paradox of disability does not allow us to establish uniform attitudes, but there is a rich palette of attitudes towards the people with disabilities and not every attitude is in positive colour. There is a lot of noise in society about

tolerance, but unfortunately it is not everywhere in the real world.

Based on empirical research, V. Finkelstein finds that in society there are indeed lots of prejudices against people with disabilities, the reasons for which are rooted in the reluctance to communicate by healthy people, ignore the status quo, lack of real awareness of their problems (difficulties) and a fear of being different. Disability is associated with the inability of the individual to take care of oneself, rejection or avoidance because of the negative perception on the part of society of the disability or dysfunction associated with it [14].

Unfortunately, much of our society is not yet sufficiently well informed about the specifics of the disabling disease and the resulting specific needs for resocialization and readaptation of the individual.

Clinical social work is intended to serve these vulnerable groups of people who, due to their illness and irresistible suffering, need continuous medical care and monitoring, but also to be accompanied by a team of specialists in the process of re-socialization and psychosocial rehabilitation.

Methods of clinical social work

Methods of clinical social work are various and similar to the methods used in social-pedagogical work as a whole. They could be categorized into three main groups:

- 1). Traditional methods.
- 2). Therapeutic methods.
- 3). Methods related to the environment.

The first category includes: casework, group and community work as well; customer-system interaction, individual approach. The second category includes methods like: psychotherapy (both individual and group), counseling, art therapy, specialized impact programs. In the third category, the methods are: assisted living in the community, support for self-management in a sheltered living environment, etc. [7, 2017, p. 15].

A particularly successful method of user impact is the resilience approach, which helps to strengthen the "supports of man". Therefore, it is a quite working model of psychopedagogical intervention, which aims to achieve the desired change in the individual to the extent that he finds the strength himself to get out of the situation of difficulty [10, 2017, p. 17]. This is a comparatively newer method but shows really

significant results. It is accepted very well by clients and they have the opportunity to feel its power to change person's attitude to situation, so he or she to be able to step out of the situation, to look around and to find way out without any help. Users start to believe more and more in their own strength.

The use of clinical social work methods is implemented at three main levels.

The first level has a more preventative focus and presupposes application to all needy individuals of the target group (general psychopedagogical support, hearing, empathy, giving information, mediation).

The second level concerns individuals from specific vulnerable groups (crisis intervention, skills to cope with difficult life situations, behavioral problems, mood swings).

The third level deals with the most severe cases and includes methods such as therapy, support, and inclusion in a mutual aid group [7, p. 17].

There are clients that starts on first level, but if the situation becomes more difficult and complicated, they move to second, even to third level. Then methods of clinical social work should be combined in a way that guarantees protection of the best interest of the social service's user.

The National Association of Social Workers of America (NASW) has developed standards for clinical social work that are applicable for use in different countries. These standards includes: ethics and values (social worker should be leaded by ethics and values as a guide to ethical decision making); specialized practice skills and interventions (a clinical social worker has to show specialized knowledge and skills for effective clinical intervention with individuals, families, and groups.); referrals (he/she has to know about community services and make appropriate referrals when it is necessary); accessibility to clients (this includes usual and emergency situations as well); privacy and confidentiality (a clinical social worker has to respect his/her clients' secrets, feelings and other information received during the intervention process); supervision and consultation (a clinical social worker needs access to professional supervision and/or consultation); professional environment and procedures (he/she has to maintain professional offices and procedures); documentation (every client should have a personal data file); independent practice (this is a personal choice but every social worker should

have right to establish an independent practice); cultural competence (a clinical social worker should provide a culturally competent service delivery); professional development (this is a personal responsibility for continued professional development); technology - this means access to all information and communication technologies for efficient and productive clinical practice and work [18].

It is very important and must be underlined that when we speak about confidentiality it should be known that it is not quite easy for a person in trouble to speak with a stranger about sensitive information from his life. If she/he acts in this way, it is based on a personal decision that she/he has to trust the social worker, so he takes responsibility for the whole information from the client [13, p. 116]. Confidentiality can be broken only in the situations when health and life of the client are threatened or there occur other circumstances which require the intervention of other specialists.

Meaning of clinical social work is to defense main human rights as: the right to be different from others; the right for an adequate lifestyle; the right to be integrated within society; the right to have opinion and to express it; the right of fully-fledged citizenship; an independent choice of the way of life and place of residence [19, p. 19], the right to be tolerated by others and not to be ignored like an insufficient, unnecessary person.

There are very interesting researches which show that there are a lot of problems in communication between health workers, patient and his/her family. Many misunderstandings and communication barriers occur exactly in this area of communication which prevent a mutual understanding between all subjects involved. Nurse, for example, is always in a hurry, she may be nervous or angry, she has no the information that patient is looking for, she is impatient with family and so on [22, p. 172]. This could be quite a reason for the patient's losing his trust in institution and not to search for professional help further. In this way he probably not be able to overcome the situation which will be harder not only for him, but for his family and friends as well.

Unfortunately, the contemporary Bulgarian reality is also not distinguished by extremely good communication between most of healthcare professionals and patients. Many of them prefer private pay services to get better treatment and treatment under more acceptable conditions.

From this it can be concluded that an individual in difficulty needs help, not only administrative, or practical, or institutional, but also emotional support that takes him / her to a higher level of skills for dealing with the problem. Clinical social work functions in this way and help the patient not to lose faith.

Finally, the need for clinical social work as a supportive profession should be emphasized. Undoubtedly, the clinical social worker needs to possess a number of skills, according to the specificity of the target group and the complexity of the cases. His support is primarily to identify and enhance the client's resources to achieve change, to improve his or her lifestyle, to find an acceptable way out of the situation, to gain experience in dealing with issues of self-doubt. Assisted clinical social work involves users who are unable to cope with the problem themselves. Clinical social work pointed to clients' families also includes established methods of support, understanding, empathy, individual and group work, collaboration, mediation.

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METHODS OF COMPARISON OF ECONOMIC RISK MANAGEMENT ASSESSMENT

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ABSTRACT

The economic risk assessment methods are part of effective management of the process aimed at the creation of reliable production. The result of the evaluation of various risks provides a basis for adjusting of individual elements in the risk management process. When specific risks management, the process is detailed with respect to the relevant risk situation, internal and external factors directly or indirectly influencing its character as well as development trends and peculiarities of existence of probable consequences. The purpose of this paper is to compare the developed methods of economic risk assessment of enterprises' industrial activities. The leading method to the study of this problem is the modeling method that allows considering of this problem as a purposeful and organized process to improve the economic risk management of economic entities' industrial activities. With the purposes of state regulation, the method of industrial risks' assessment by economic sectors is adapted in the paper, based on the concept of reliable production; the subject structure of organizational and economic, production and technical, ecological and economic risks' areas in industrial enterprises of the Republic is investigated. The practical value is that the developed methodology allows the authorities of the region to improve the development and implementation of management decisions and more accurately identify priority areas for economic development of socially significant industrial enterprises.

Key words: *economic risk management assessment, statistical method, expert method, composite method*

INTRODUCTION

Risk is a probability category and is measured as the probability for a certain level of loss. Each manager determines for himself an acceptable level of risk. The tolerable risk can be considered the threat of full loss of profit from one or another project or of the managerial activity as a whole. Marginal degree of risk is associated not only with the loss of profits, but also the failure of the alleged revenue when costs have to be borne by the manager. Catastrophic risk is the most dangerous one for the manager because it leads to the bankruptcy of the enterprise, investment losses or even loss of personal property of the owner of the business.

Organization of management activities in search of adverse situations, including the identification of new aspects of organizational risk's manifestation requires quick actions. Monitoring of changes in the risks' parameters and their adjustment can be significant in the management process [4]. Development of ways and means of losses' minimization, neutralization and compen-

sation of the negative consequences, the insurance and other protection possibilities against risks are the necessary conditions for the formulation and implementation of an effective process of risk management. The timely adoption of the necessary measures is the main precondition for stabilizing of the situation and reducing of the losses' threat.

RESULTS AND DISCUSSION

When deciding on an acceptable level of economic risk it is important to know not only the probability to suffer certain losses, but the probability that losses will not exceed a defined amount. The need for detailed calculation occurs in the following situation. A manager, for an example, knows that losses of 100,000 EUR will not change his managerial activity, but losses of one million EUR will lead to financial difficulties, which he should not be condemned. In such conditions it is important to know not the probability of losses in the amount of 100 000 EUR,

but the probability that losses exceeding 100 000 EUR.

For the determination of risk statistical, expert and combined methods are used.

2.1. Statistical method for determining risk

The essence of the statistical method lies in the studying the statistics of losses and profits that exist in a similar company, the magnitude and frequency of one or another economic leasing is determined, and the most probable forecast for the future is drawn [8].

The main tools of the statistical method for calculating risk are variance, dispersion and standard deviation.

- Variation is the change (volatility) of the quantitative assessment of the degree of risk incurred when switching from one case (option, output) to another, for example, comparison of risk taken against the climate of economic profitability over the years.

The variance is estimated by dispersion, i.e. the degree of dispersion (variation) of the actual importance of the level of risk assumed by its mean value. For assessing the level of risk, the average economic profitability should be determined taking into account the likelihood of one or another level of profitability from the previous

period in the future period of interest. Zero probability means impossibility of getting profitability, single - surely getting it. The sum of the probabilities of all possible options for the preparation of lease is equal to one.

Example 1. Economic profitability of a company "X" for the past 10 years is shown in Table 1. To determine the average economic returns for the period until 2018 we calculate the simple average.

$$\overline{EP} = \frac{18 + 13 + 16 + 15 + 11 + 16 + 15 + 16 + 13 + 17}{10} = 15\%$$

Where:

\overline{EP} - the average economic profitability

A better practice is to calculate the average economic profitability by finding the sum of the actual economic profitability (EP_i) and the corresponding probability (P_i):

$$\overline{EP} = \sum_{i=1}^n EP_i \times P_i$$

	Years										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Economic Profitability, %	18	13	16	15	11	16	15	16	13	17	?

Table 1. Economic profitability of company X for 2009 – 2019, in percentage (ex. 1)

If we look at Table 1 we find that the economic profitability has reached the level of 18% only once in 10 years. The likelihood of such a return is 0.1. The 17% cost-effectiveness is also achieved only once. The probability here is therefore 0.1. The profitability of 11% is also reached once. Here the probability is 0.1. The 13% profitability is reached twice. The probability is 0.2. The 15% profitability is also reached twice, so the probability of obtaining such profitability is 0.2. The 16% profitability has been reached three times. Its probability is 0.3. Thus, we obtain:

$$\overline{EP} = (18\% \times 0.1) + (17\% \times 0.1) + (11\% \times 0.1) + (13\% \times 0.2) + (15\% \times 0.2) + (16\% \times 0.3) = 15\%$$

The weighted average dispersion is calculated:

$$D = \sum_{i=1}^n (EP_i - \overline{EP})^2 \times P_i$$

Where:

D is the dispersion

The dispersion is calculated in table 2.

$EP, \%$	Probability, P_i	$EP_i \times P_i, \%$	$EP_i - \overline{EP}$	$(EP_i - \overline{EP})^2 \times P_i$
11	0,1	11 x 0,1 = 1,1	11 - 15 = - 4	(- 4) ² x 0,1
13	0,2	13 x 0,2 = 2,6	13 - 15 = - 2	(- 2) ² x 0,2
15	0,2	15 x 0,2 = 3,0	15 - 15 = 0	0 ² x 0,2
16	0,3	16 x 0,3 = 4,8	16 - 15 = 1	1 ² x 0,3

17	0,1	$17 \times 0,1 = 1,7$	$17 - 15 = 2$	$2^2 \times 0,1$
18	0,1	$18 \times 0,1 = 1,8$	$18 - 15 = 3$	$3^2 \times 0,1$
	Sum = 1	Average $EP = 15$	Dispersion = 4 Standard deviation = 2 %	

Table 2. Calculating the dispersion and the standard deviation (ex. 1)

From the resulting dispersion is extracted the square root. The higher the result - the so-called standard deviation, the riskier is the project under consideration / the decision / the overall activity of the company, subject to analysis. The standard deviation is calculated using the following formula:

$$SD = \sqrt{D}$$

Where:

SD is the standard deviation

D is the dispersion

In this case the dispersion is equal to 4, and the standard deviation is $\sqrt{4} = 2\%$. This means that the most likely deviation of the economic profitability from its average (15%) in 2019 will be a plus or minus 2%:

$$EP_{2015} = 15\% \pm 2\%$$

The statistical method for determining risk requires a considerable array of data, which is not always available to the manager. Collection and processing of data can be costly. Therefore, in case of deficiency or absence of information, it is necessary to use other methods for determining risk.

2.2. Expert method for determining risk

The method can be realized by processing the opinion of experienced managers or professionals. It is desirable for experts to back the estimates with data about the probability of occurrence of different magnitudes of losses (amount or percentage), but also may be presented expert assessments of the probability of allowed and critical risk, or simply to assess the likely losses related to the specific managerial activity.

2.3. Combined method for determining risk

The most acceptable practice is the combined method, which uses statistical and expert methods for determining risk.

Risk identification is necessary for the adoption of investment decisions. Selecting investment decisions in conditions of risk depends not only on economic gains, but also the degree of risk [7].

Assume that there are two projects for a specific site. In accordance with the preliminary

estimates, the expected gains from project "A" are 18%, and for "B" - 13%. However, "A" is riskier either because it requires scarce materials (which at a given time may not be possible to be delivered), or it is more complex in operation (the smallest error in the management may reduce the gains to zero). The question what project to choose arises [2]. The decision will be taken according to the individual inclination of the manager to taking risk and to the specific situation in which the company is. Which is more important: gains or high stability, i.e. minimal risk?

In conducting the analysis of risk, the manager must consider the new project is not in isolation but in relationship with other projects and with the already pre-set activities in the company. If the gains from one project (activity) are increased, then how will that change the gains from another one? In order to minimize the risk, it is desirable to choose the production of such goods (services), the demand for which is in the opposite direction, i.e. by increasing the demand for certain goods, the demand for other goods decreases and vice versa. Take for example the production of mopeds and bicycles. Increasing fuel prices may reduce demand for mopeds and increase demand for bicycles and vice versa, a fall in fuel prices to increase the demand for mopeds and reduce the demand for bicycles. Such dynamics of change of demand makes mopeds and bicycles suitable for diversification of production.

The index "correlation" is used in economic statistics for the measurement of the relationship between any types of actions or proceedings. Correlation is the relationship between signs consisting of the change of the average of one of them depending on the change of another, i.e. the relationship between two or more signs of causally related events.

We distinguish positive and negative correlation. If the average value of any sign is amended in the same direction in which is amended the importance of the other sign, we talk about positive correlation between them. If the amendments are aimed differently, this shows negative correlation.

To ensure successful operation of industrial enterprises the implementation of measures is required to prevent the emergence of adverse situations. To select the necessary methods for their control it is necessary to develop methods of hazard identification and objective assessment of risk. The concept of risk is widely used in many Sciences. The variety of directions of research on risk is explained by the multidimensional nature of this phenomenon. In this study, risk is understood as the possibility of existence of adverse events or undesirable events with negative consequences, losses and damages as a result of production and economic, financial and economic/or innovative activities of organization (enterprises, firms, companies). Quantitatively, risk is estimated by the probability of occurrence of adverse events or undesired events and specific measures due to the situation or unwanted event and specific measures resulting from these phenomena of possible losses, damage, lesion or win. There is a complex classification of types of risks that may arise during the operation of in-

dustrial plants. Three main types of risks should be considered: Organizational - economic, production and technical and ecological-economic. Organizational and economic risks are reasoned by ineffective management; inadequate marketing policy; failures in the financial and economic activities; the lack of control, etc. Production and technical risks are associated with the operation of equipment; violations of technological regimes; conduct of maintenance; failure of equipment, information and computer systems, etc. Ecological and economic risks are conditioned by the events' occurrences in production and economic activities that do harm to the environment [1].

Example 2. We assume that the company specializes in the production of product "A". You have to decide: how to supplement the production of product "A": with the production of product "B" or with the production of product "C"? The calculations required for the decision are shown in Table 3.

Years	Gains by products, %			Deviation from the average meaning, %			Correlation	
	Product "A"	Product "B"	Product "C"	Product "A"	Product "B"	Product "C"	Between products "A" and "B" (5) x (6)	Between products "A" and "C" (5) x (7)
<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	<i>6</i>	<i>7</i>	<i>8</i>	<i>9</i>
2005	9	9	9	-5	-1	1	$(-5) \times (-1) = 5$	$(-5) \times (1) = -5$
2006	14	6	12	0	-4	4	$(0) \times (-4) = 0$	$(0) \times (4) = 0$
2007	14	8	9	0	-2	1	$(0) \times (-2) = 0$	$(0) \times (1) = 0$
2008	8	8	11	-6	-2	3	$(-6) \times (-2) = 12$	$(-6) \times (3) = -18$
2009	15	10	8	1	0	0	$(1) \times (0) = 0$	$(1) \times (0) = 0$
2010	17	13	5	3	3	-3	$(3) \times (3) = 9$	$(3) \times (-3) = -9$
2011	17	13	6	3	3	-2	$(3) \times (3) = 9$	$(3) \times (-2) = -6$
2012	10	10	7	-4	0	-1	$(-4) \times (0) = 0$	$(-4) \times (-1) = 4$
2013	14	10	6	0	0	-2	$(0) \times (0) = 0$	$(0) \times (-2) = 0$
2014	22	13	7	8	3	-1	$(8) \times (3) = 24$	$(8) \times (-1) = -8$
	Average gains						Sum= 59	Sum= -42
	14	10	8					

Table 3. Calculating correlation (ex. 2)

If you examine the dynamics of the 10 years under consideration, we find that the correlation between the production of product "A" and the production of an article "B" on average is equal to $59:10=5.9$, i.e. there is a positive correlation. With the increase in income from the production of product "A", the income from product "B" increases and with the reduction in income from the production of product "A", the income from the production of product "B" decreases. Along

with this, the dynamics of the gains (profitability) of the production of product "A" and the production of the product "C" shows a negative average correlation level of $-42:10=-4.2$. This means that with the increase of income from the production of product "A", the income from the production of product "C" decreases. However, with the reduction in income from the production of product "A", the income from the production of product "C" increases.

In this case, the production of product "C" may not be very profitable, but its negative correlation with production of product "A" makes it good for diversification. Diversification with negative correlating products partly reduces the

aggregate profitability of the company, but sharply reduces the risk of reduction in income.

The dispersion and the standard deviation for the three products are calculated in tables 4, 5 and 6 respectively [3].

$EP, \%$	Probability, P_i	$EP_i \times P_i, \%$	$EP_i - \overline{EP}$	$(EP_i - \overline{EP})^2 \times P_i$
8	0,1	$8 \times 0,1 = 0,8$	$8 - 14 = -6$	$(-6)^2 \times 0,1 = 3,6$
9	0,1	$9 \times 0,1 = 0,9$	$9 - 14 = -5$	$(-5)^2 \times 0,1 = 2,5$
10	0,1	$10 \times 0,1 = 1,0$	$10 - 14 = -4$	$(-4)^2 \times 0,1 = 1,6$
14	0,3	$14 \times 0,3 = 4,2$	$14 - 14 = 0$	$(0)^2 \times 0,3 = 0$
15	0,1	$15 \times 0,1 = 1,5$	$15 - 14 = 1$	$(1)^2 \times 0,1 = 0,1$
17	0,2	$17 \times 0,2 = 3,4$	$17 - 14 = 3$	$(3)^2 \times 0,2 = 1,8$
22	0,1	$22 \times 0,1 = 2,2$	$22 - 14 = 8$	$(8)^2 \times 0,1 = 6,4$
	Sum = 1	Average $EP = 14$	Dispersion = 16 Standard deviation = 4 %	

Table 4. Calculating dispersion and standard deviation for product "A" (ex. 2)

$EP, \%$	Probability, P_i	$EP_i \times P_i, \%$	$EP_i - \overline{EP}$	$(EP_i - \overline{EP})^2 \times P_i$
6	0,1	$6 \times 0,1 = 0,6$	$6 - 10 = -4$	$(-4)^2 \times 0,1 = 1,6$
8	0,2	$8 \times 0,2 = 1,6$	$8 - 10 = -2$	$(-2)^2 \times 0,2 = 0,8$
9	0,1	$9 \times 0,1 = 0,9$	$9 - 10 = -1$	$(-1)^2 \times 0,1 = 0,1$
10	0,3	$10 \times 0,3 = 3,0$	$10 - 10 = 0$	$(0)^2 \times 0,3 = 0$
13	0,3	$13 \times 0,3 = 3,9$	$13 - 10 = 3$	$(3)^2 \times 0,3 = 2,7$
	Sum = 1	Average $EP = 10\%$	Dispersion = 5,2 Standard deviation = 2,28 %	

Table 5. Calculating dispersion and standard deviation for product "B" (ex. 2)

$EP, \%$	Probability, P_i	$EP_i \times P_i, \%$	$EP_i - \overline{EP}$	$(EP_i - \overline{EP})^2 \times P_i$
5	0,1	$5 \times 0,1 = 0,5$	$5 - 8 = -3$	$(-3)^2 \times 0,1 = 0,9$
6	0,2	$6 \times 0,2 = 1,2$	$6 - 8 = -2$	$(-2)^2 \times 0,2 = 0,8$
7	0,2	$7 \times 0,2 = 1,4$	$7 - 8 = -1$	$(-1)^2 \times 0,2 = 0,2$
8	0,1	$8 \times 0,1 = 0,8$	$8 - 8 = 0$	$(0)^2 \times 0,3 = 0$
9	0,2	$9 \times 0,2 = 1,8$	$9 - 8 = 1$	$(1)^2 \times 0,1 = 0,1$
11	0,1	$11 \times 0,1 = 1,1$	$11 - 8 = 3$	$(3)^2 \times 0,1 = 0,9$
12	0,1	$12 \times 0,1 = 1,2$	$12 - 8 = 4$	$(4)^2 \times 0,1 = 1,6$
	Sum = 1	Average $EP = 8 \%$	Dispersion = 4,5 Standard deviation = 2,12 %	

Table 6. Calculating dispersion and standard deviation for product "C" (ex. 2)

The conclusion we have of these calculations is that in drawing up investment programs risk reduction can be done by selecting the projects that are in a negative correlation with each other.

However, can any risk be reduced through diversification? In fact, no. The truth is that many macroeconomic processes influence the management, such as the expectation of progress or crisis, the movement of bank interest rates and more. The risk, which is a result of these processes, cannot be reduced by the financial manager with the diversification of production. Such

a risk is called non-diversifiable or unsystematic risk. In the context of Decision-Making theory, the magnitude of the risk an individual can depend on the consequences of a wrong decision, the benefits of making the right decision and the probability of negative result [5].

Decision making suggests closer linking of all types of risks - diversifiable and non-diversifiable, as even the best estimates of the financial manager may not be fulfilled due to unexpected and unforeseeable circumstances beyond our control: general economic fluctuations, changes

in the tastes of customers, actions of competitors, strikes, unforeseen government decisions, etc. Therefore, in case of the occurrence of adverse events opportunities to reduce the negative effects at the expense of cash reserves, production capacity, raw materials, finished products should be provided; materially secured plans for reorientation of the activity should also be prepared and provided. What is more, despite the progress of Industry 4.0, human decisions regarding the recognition and communication and evaluation of perceived environmental signals exceed, in many cases, the possibilities of automation [6].

CONCLUSION

Significant risk reduction could be achieved by forecasting effectively and internal planning, self-providing and insurance, transfer of part of the risk to other individuals and organizations through hedging, futures and options, etc. Self-providing is associated with the formation of a special reserve fund for covering losses on account of parts of the company's own working capital. Self-providing (self-insurance) is appropriate when the value of the insured property is relatively small compared to the property and financial parameters of the whole business. Property insurance also does not make sense when the probability of loss is very small, or when the company has a large number of identical units' property. For example, transnational oil companies holding several hundred tankers do not use insurance. The calculation here is simple and logical: the loss of one tanker per year (which is unlikely) in any case will cost the company less than the payment of insurance premiums for all tankers. Therefore, often there is very high risk of not covering economic losses in maritime disasters.

Hedging is another way of reducing the risk. It basically is creating cross currency, trade credit and other claims and liabilities. Hedging is widely used by companies transporting raw materials to ensure a projected level of income by passing the risk to the other side. The supplier ensures the reception of a fixed price; in case the price falls at the time of completion of the

transport service. Often hedging is used for insurance against currency risk, i.e. against the risk of amending the exchange rate on the maturity date.

The measurement of value, risk and capital will soon demand the application of 'stochastic' modelling tools. In this paper, it is explored some of the issues raised by the application of these approaches to the valuation and risk management of with-profits business.

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**RETROSPECTIVE ANALYSIS OF THE ASSIGNMENT PROBLEM
UNDER UNCERTAINTY**

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ABSTRACT

The paper provides a historical review of the recent developments of the assignment problem as well as its methods for solution in the conditions of an uncertain or an unclear environment. The idea, along with the outlined approaches for solving the problem, is to give researchers directions for development of new types of fuzzy three-dimensional and multidimensional assignment problems and new algorithms for their solution.

Key words: *assignment problem, solution, intuitionistic fuzzy set, index matrix*

INTRODUCTION

Employees are the most important asset of any company. This requires careful selection of staff at all levels of a company to find the best assignments for the jobs. The assignment problem (AP) was first introduced by Flood [22], who regards the problem as the most “degenerate” case of the transportation problem [59]. The AP was formulated in 1952 by Votaw and Orden (see [63]). The basic objective is to assign n number of resources to n number of activities so as to minimize the total cost or to maximize the total profit of allocation in such a way that the measure of effectiveness is optimized. The AP and is known to be NP-hard [15]. The definition of the AP, satisfies the following assumptions [31]:

- The number of assignees and the number of activities (jobs, tasks) are the same.
- Each assignee is to be assigned to exactly one activity.
- Each activity is to be performed by exactly one assignee.
- There is a cost c_{ij} assigned with assignee i ($i = 1, 2, \dots, n$) performing the activity j ($j = 1, 2, \dots, n$).
- The objective is to determine how all n assignments should be made to minimize the total cost.

The mathematical model of the AP is [32]:

$$\min \sum_{i=1}^n \sum_{j=1}^n c_{ij} x_{ij} \quad (1)$$

Subject to

$$\sum_{j=1}^n x_{ij} = 1 \quad (2)$$

$$\sum_{i=1}^n x_{ij} = 1 \quad (3)$$

$$x_{ij} \in \{0,1\}. \quad (4)$$

In today's market environment, it is necessary to make a quick decision regarding the recruitment of vacancies. In real-life APs, decision makers may face with many uncertainties on the cost of appointing candidates depending on the experience, the education and the professionalism of the applicants. The costs are not stable since this imprecision may follow from the lack of exact information or data and uncertainty in judgment.

The aim of the paper is to provide a short historical overview of the types of APs and the methods for solving them both in a clear and an uncertain environment.

LITERATURE REVIEW

The basic polynomial time algorithm for the AP is the Hungarian method, which was developed by Kuhn in 1955 [32] and solves the problem for $O(n^4)$ time, where n is the number of sources or tasks that need to be assigned. The method is based on the work of two Hungarian mathematicians, Evgary and Konig in the honour of which Kuhn named the algorithm the Hungarian [32]. The Hungarian method uses the

principle to transform a matrix into a sparse matrix by subtracting the minimal elements from each row and column, resulting in multiple zero entries while not affecting the optimal assignment of the matrix. When the matrix is sufficiently sparse, an assignment of zeros entries that correspond to the minimal assignment would be possible and choosing such an assignment would solve the AP. The method is subsequently reviewed by Munkres [42], who offers the reduction of the worst-case computational complexity from $O(n^4)$ to $O(n^3)$. Dantzig solved the problem using linear programming [19]. The most important and used method to achieve optimality for AP is the Branch and bound method, which was firstly introduced by Gilmore in 1962 [25]. The main idea is as follows: the algorithm starts with the empty permutation and successively extend it to a optimal permutation. Bertsekas [14] has been proposed an efficient implementation of the shortest path algorithm and has been showed that the algorithm has a theoretical complexity of $O(n^3)$. Another interesting approach by Kosowsky and Yuille, in 1991, manages to find a solution to the AP using an approach related to statistical physics [30].

Balas [12] represented the parallel implementation of the shortest path algorithm for the AP. A faster version of the AP is also proposed in Wright [64], which implements the minor modification in cost matrix to reduce the execution time. A three-dimensional assignment problem (3D-AP) has been arisen as an extension of the two-dimensional AP [56]. Algorithms for the 3D-AP have been developed. An algorithm to solve 3D-AP, which indirectly evaluates all feasible solutions, was given by Pierskalla [46]. Olivo [44] suggested an algorithm that mixes the Hungarian method [32] for solving AP and the Branch and bound technique given in [38] to solve the travelling salesman problem. Hung and Lim [28] proposed a local search genetic algorithm-based method to solve the 3D-AP, but they could not guarantee that an optimal solution could be obtained. 3D-AP model was presented in [37] and two Branch and bound based algorithms have been proposed to solve the model. The quadratic AP has been introduced by Koopmans and Beckman who were trying to model a facilities location problem [29]. They first introduced the quadratic AP as a mathematical model for the location of indivisible economical activities. The problem stated as a facility location problem is to assign

facilities to locations such that the total interaction cost of all possible flow-distance products between the locations to which the facilities are assigned plus the allocation costs of facilities to locations are minimized. This type of the AP has applications in layout problems, backboard wiring, computer manufacturing, scheduling, process communications and turbine balancing. Burkard and Offermann, in 1977, showed that this problem can be applied to typewriter keyboard design [16]. The problem is to arrange the keys on a keyboard such as to minimize the time needed to write some text. The most accepted improvement methods are the local search and the tabu search. Both methods work by starting with an initial basic feasible solution and then trying to improve it. The local search [56] seeks an improved solution in the neighborhood of the current solution, terminating when no better solution exists within that neighborhood. The tabu search, was initiated by Skorin-Kapov in 1990 [55], works similarly to the local search. Genetic algorithm for finding of the optimal solution of the AP has been researched by Fleurent and Ferland [21]. Genetic algorithm belong to the class of algorithms, which generate solutions to optimization problems using techniques inspired by natural evolution, such as inheritance, mutation, selection, and crossover. The ant colony optimization algorithm has been applied by Gambardella, Taillard and Dorigo on AP [23]. The algorithm is based on a hybridization of the ant system with a local search method, each ant being associated with an integer permutation. Modifications based on the pheromone trail are then applied to each permutation. The solutions found so far are then optimized using a local search method, update of the pheromone trail simulates the evaporation and takes into account the solutions produced in the search strategy.

Many APs have been arisen in unclear circumstances. In 1965, Zadeh introduced the fuzzy sets theory [65]. As there is a hesitation in the parameters of AP many authors have solved this problem under intuitionistic fuzzy environment. In 1983, Atanassov proposed the IFSs [2, 4], which is more reliable than the FSs proposed by Zadeh. The major advantage of IFS over FS is that IFS separates the degree of membership (belongingness) and the degree of non membership (non belongingness) of an element in the set.

There are different approaches for solving the AP with fuzzy and intuitionistic fuzzy data.

Many researchers have studied AP in a fuzzy environment. Aggarwal et al., in 1987, developed two algorithms for solving bottleneck assignment problems [1]. Costs in many real life applications are not deterministic numbers. Chen, in 1985, solved a fuzzy assignment model that considers all individuals have same skills [18]. He proposed a fuzzy assignment model that did not consider the differences of individuals. Sakawa et al., in 2001, considered interactive fuzzy programming for multi level linear programming problems to obtain a satisfactory solution for decision making [52]. Huang and Xu, in 2005, proposed a solution procedure for the AP with restriction of qualification [26]. In [33, 43] a fuzzy AP (FAP) has been defined, which is first converted into classical problem by Robust ranking method and then Hungarian method is used to solve it. The row penalty method for solving fuzzy AP was discussed in [51]. A parallel moving method has been used for solving FAP in [45]. The optimal solution of FAP is obtained using fuzzy Hungarian algorithm in [48]. Method for solving FAP using ones assignment method and robust's ranking technique was presented by Shrinivasan, in 2013 [53]. Fuzzy algorithms of APs are defined in [35, 36, 41, 54], a quadratic FAP is researched in [40], multi-criteria FAPs are given in [13, 27], two-objective FAPs are defined in [20], and multi-job fuzzy APs in [39].

Intuitionistic fuzzy AP (IFAP) with the trapezoidal intuitionistic fuzzy numbers is solved in [49]. In [50] was proposed an optimal algorithm for the IFAP with triangular intuitionistic fuzzy costs (special case of intuitionistic fuzzy numbers). In [17] has been identified a set of relevant decision criteria and their subcriteria needed in the evaluation of the cloud computing technology provider selection problem in uncertain environment.

A new approach to assignment-type problems, based on the index matrix concept, which was introduced in 1984 [2, 3], has been presented in [60, 61, 62].

Intuitionistic fuzzy Hungarian method, based on the intuitionistic fuzzy sets [5] and index matrices concepts [6, 58], is proposed in [60] for finding an optimal solution of IFAP. The resource AP in an uncertain cloud computing environment has been modeled in [61] by the concepts of intuitionistic fuzzy logic [7] and three-dimensional index matrices [6, 57] and has been proposed three-dimensional intuitionistic fuzzy Hungarian algorithm to find the optimal

distribution of tasks to resources over time (by location or other). The costs/times for doing tasks by virtual machines are intuitionistic fuzzy pairs [11] and also are known in advance as the priority of tasks. This method solves the problem directly without converting it into a classical linear problem. The time complexity of the proposed algorithm is comparable with that of the standard Hungarian algorithm.

The fuzzy and the intuitionistic fuzzy approach to the AP cannot be handled with uncertainty in determining the costs for assigning jobs to candidates. Atanassov and Gargov generalized IFS as interval-valued IFS (IVIFS) [9].

Interval-valued IFAP (IVIFAP) has been proposed in [34] by using similarity measure and score functions. In [47] a new IVIFAP with replacement has been proposed and the solution procedure has been discussed with IF aggregation operators. The IVIFAP by using similarity measure and score functions has been proposed in [24].

In the paper [62], has been modeled by the concepts of IVIFSs and IMs the AP, in which the costs are interval-valued intuitionistic fuzzy pairs [10]. In this paper, the authors have been proposed for the first time an interval-valued intuitionistic fuzzy Hungarian algorithm to find its optimal solution.

The main advantages of the algorithms, presented in [60, 61, 62], are that the algorithms can be applied to balanced and unbalanced problems with imprecise parameters and can be extended in order to obtain the optimal solution for other types of multidimensional APs [8].

CONCLUSION

The article provides a literary overview of the emergence and ways of solving the assignment problem in a clear and an uncertain environment. Modern approaches, based on the intuitionistic fuzzy sets and index matrices concepts, for solving two-dimensional and three-dimensional IFAPs were presented. In future the authors will try to formulate and find solutions to other types of n -dimensional APs that have arisen in an uncertain environment.

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CIRCULAR ECONOMY BUSINESS MODELS AS A SUSTAINABLE COMPETITIVE ADVANTAGE

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ABSTRACT

The ordinalry linear economy is at a stage that does not suit any more the needs and requirements of modern society in the context of sustainable development concept. What is more it generates waste in gigantic quantities and exhausts the natural ressources of the earth, especially the non-refundable ressources, such as rare metals and hydrocarbons. The adequate answer to this existential challenge is the 'circular economy' concept and its implementation on corporate, national and regional level.

Key words: *circular economy, non-recoverable natural resources, public and corporate models of cicular economy, waste management, eco-design, industrial symbiosis.*

INTRODUCTION

Depletion of non-recoverable natural resources is an existential problem for modern human society. The rise of human civilization is marked by the emergence and development of economic systems and models such as the natural exchange, the division of labour and the market economy, which contributed to revolutionizing the industry and the development of digitalization, hence the Fourth Industrial Revolution (Industry 4.0) these days. According to some forecasts, block-chain technology will be the basis of even the fifth industrial revolution. As a major macroeconomic problem was identified the use of limited production resources to meet the unlimited needs of the human community. Concepts such as extensive and intensive development and growth, resource and investment-driven industries, low-cost, competitive strategies and knowledge-based economy are widely accepted as the cornerstone of economic theory. The negative consequences of these forms of a "linear" economy and its based practice and the need for new business solutions are increasingly evident. As indicators, we can identify the acceleration of the rate of consumption and depletion of natural resources (mostly rare metals), the pollution of the atmosphere, the world ocean and the habitat, the disappearance of plant and animal speciesq increasing climate change in combination with

the demographic boom in many regions of the world and the globalisation of markets.

EXPOSITION

In 2014, the European Union Member States produced more than 2.5 billion tonnes of waste, of which only 50% were recycled (Table1). While the recycling capacity is growing, practically half of the materials used are still coming out of the reproductive cycle. According to a World Bank report by 2025, mankind will produce 2.2 billion tons of garbage per year [1]. According to the World Economic Forum in 2016, only 20% of the generated electrical and electronic waste (nearly 45 million tonnes) were recycled, 4% were dumped in landfills and the remaining 76% lacked information. The European Union is currently renewing his legislation to encourage a move towards a more sustainable model known as the circular economy. One of the key documents is the Circular Economy Action Plan adopted in December 2015. In general, the life of resources in Europe is limited to a single cycle. In the foreseeable time horizon there is a depletion of non-renewable resources-coal, oil, metals. According to current forecasts, the population of the land will increase by a new 3 billion. To 2030. As a consequence, the growth of resource consumption and the preservation of eco-balance is becoming a critical challenge,

	EU/Member state	Municipal waste generated [kg/capita]	Share of recycling and composing (%)	Share of landfill disposal (%)
1	EU 28	482	47	25
2	Denmark	777	48	19
3	Malta	647	8	92
4	Germany	626	66	1
5	Austria	564	59	3
6	Bulgaria	404	32	64
7	Sweden	443	49	1
8	Belgium	420	54	1
9	Greece	497	17	82
10	Ireland	567	42	22
11	Netherlands	520	53	1
12	Italy	497	51	28
13	France	510	42	22
14	Slovenia	449	58	24
15	Luxemburg	614	48	17

Table 1. EU Waste Management: Infographic with facts and figures European Parliament News 2019[3].

and the environmental and business problems are increasingly difficult to solve. The assessment of Table 1 date results in the conclusion about the seriousness of problem of low share of recycling and composing and insufficient landfill disposal in representative part of EU member states. Referring waste management in the EU the target for reuse and recycling for 2025 is minimum 55%, and the target for landfilling of municipal waste is maximum 10%.

There are a number of key environmental meetings that will shape nature to protect the species and protect oceans in the decades ahead. A startling report showed that up to a million species (both plant and animal) could disappear in the coming decades. To deal with this, governments will meet in China in 2020 to try to reach an agreement that will protect the creatures of all kinds. If all this happens in the best way, the world may have a chance to preserve our natural environment. But the challenges are huge, and political involvement is uneven.

In the Netherlands the process of implementing the circular economy concept has already begun at the end of 2016. The government adopted a programme for the development of a circular economy until 2050. By 2030 the use of basic raw materials (minerals,

fossil and metals) should be halved. "This is present " corresponds the advisor on agriculture at the Embassy of the Kingdom of the Netherlands in Bulgaria, Emar Hemeke, the question whether the circular economy is the future[4].

Conceptual basis of a circular economy

As possible and appropriate, and too possible in the future a non-alternative response to these negative and alarming tendencies has arisen the concept of "circular economy (economy of circles). The traditional way of production and consumption is based on the principle "from cradle to grave", that is, the product is produced, consumed and disposed of. The "cradle-to-cradle" principle shows the recycling of the product and/or its reuse. A circular economy is a concept in which growth and prosperity are seen in the context of the efficient and non-waste consumption of natural resources and the maintenance of eco-balance. Cyclical processes are impermanent inherent in economic life and examples are the reproductive process, the depreciation process of assets, etc. The aim of the circulation is to achieve a balance. The foundations of sustainable development were put in place in the 60-ies of the last century, focusing

on the link between the environment and resource recovery, as well as on the economy and social well-being. Thinking about sustainable development reached the general consciousness in the 90-ies and has since been graded in different ways. By the end of the first decade of the new century, a new economic model, known as the “green economy”, was introduced. It has different processes related to sustainable consumption and production, green growth, low carbon economy and resource consumption efficiency. The concept of a circular economy, which is a founding element of the green economy, began to evolve in the 70-ies as an alternative economic model, questioning the traditional linear economy. Until then, a linear process aimed at high productivity and low production costs was applied, relying on the abundance of raw materials at a relatively low cost.

The emergence of the "circular economy" concept can be traced at the end of the 80-ies in the writings of David Pierce and Kerry Turner. According to them, the economic order does not have a built-in mechanism for recycling resources and treats the environment as a waste tank. The current concept is based on the work of Pierce and Turner and includes a number of other ideas such as the concept of "cradle to cradle", which implies an infinite cycle of use of resources, biomimetics or adaptation of existing forms in nature in technology, the approach to environmental assessment and others. In short, the circular economy aims to prolong the life cycle of resources by minimising the use of non-recyclable waste

The typical process model includes several stages—extraction of raw materials, production, consumption and disposal of the products at the end of their life cycle. On the other hand, the circular process seeks a low environmental impact by limiting the amount of waste and excessive use of resources, transforming the goods after their use into resources for others through reuse, secondary production, recycling, reduction of waste materials and other practices. In other words, the circular economy is striving for resumption (Diagram 1).

"It is a system of approaches to securing natural resources so that all people on the planet reach an acceptable level of prosperity without destroying the planet within this process ", summarizes Nick Vulvuliis, a professor of environmental technology in Imperial College London[6].

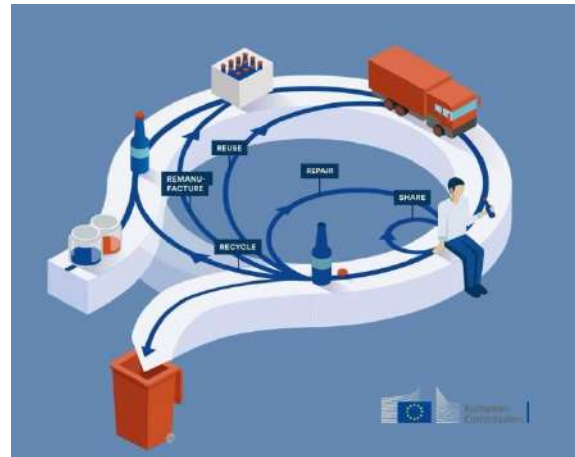


Diagram 1. Cycle of Circular Economy [5].

Recycling is a word that is entering more and more homes. However, the concept of a circular economy develops a recycling approach as waste products are not disposed of, but are made to be easily repaired, converted into others or combined. Businesses are responsible for their products far after selling them, and the key principle is cooperation between different industries so that each of them can use waste materials from others. The semantics of the concept is qualified by scientific and practical developments such as green business and green strategies, clean technologies, innovative eco-entrepreneurship, eco-economy, waste economy, industrial symbiosis, sustainable development and environmentally neutral business environment. By the term "primary material" are described products that can be recycled and re-sold. Prolonging product life, reusing products and their components, and processing are a key element of the circular economy. Re-use shall preserve the physical characteristics of the raw materials as well as the energy consumed in the products and their constituent parts.

The circular economy is a model aimed at prolonging the life cycle of products. In practice, this means as long as possible the sharing, borrowing, reuse, repair and recycling of existing materials and products. When a product reaches the end of its life cycle, within the meaning of Raymond Vernon's theory, the materials from which it is composed continue to be enjoyed otherwise. This is done over and over again and the waste disposal is reduced to a minimum. The concept is opposed to a traditional linear model, where raw materials are used, things are created from them, they are consumed, and leftovers are discarded. This model relies on large quantities of cheap and affordable materials and sources of

energy. Part of the traditional model is also the embedding of defects in the appliances to stop them from working on a certain date or after a certain number of cycles and users to be forced to buy new ones.

This concept is constantly enriched with the participation of broad scientific circles, universities and legislators, becoming increasingly institutionalised at national and community level and engaging in a significant degree of business representatives. The circular economy is a new trend that brings together economic growth and environmental protection, but in order to be necessary, the assistance of consumers and businesses is needed.

Principles of the circular economy

In the context of this, we highlight the following principles of the circular economy:

- Saving of natural resources and energy through the introduction of productive and less resource-intensive and high-performance technologies;
- Clustering at industry level;
- Change the design of products for better recycling;
- A shared economy in the whole variety of forms;
- Repairability, reuse, durability and renovation of materials, which significantly surpass the recycling level;
- Changing the life cycle of the product;
- Eco-design of the product;
- Extension of the warranty period and after service;
- Waste management and the market for secondary raw materials;
- "Industrial Symbiosis"- forming alliances and cooperation between enterprises, in which the waste at the outlet of one sector or enterprise is an incoming product for another;
- Creation of "green" job positions.

The future productive cycle and patterns of production and consumption are increasingly difficult to manage in the way these models are organised today. Many businesses from Europe have already taken up a circular economy or are planning to do so.

Public and corporate models of the economy of the circles

The European Union in 2015 adopted an Action plan for the circular economy. It relies on better ecodesign, waste prevention and re-use with a view to achieving net savings of EU

businesses of up to 600 billion per year, while reducing total annual emissions of greenhouse. Further measures to increase resource productivity can lead to an increase of GDP by nearly 1% by 2030 and the creation of 2 million additional jobs at the same time. Between 6 and 12% of the consumption of all materials, including fossil fuels, is currently avoided as a result of recycling, waste reduction and eco-design policies. The maximum, which can be achieved with existing technologies, is 10-17%, and by using innovative technologies and improving resource efficiency, inputs that are used in the EU can be reduced by 24% by 2030. The European Commission has already decided to tackle the so-called planned ageing of the products with a focus on repair, endurance and material renewal, which is well above the currently required recycling level. This is just one of the ways in which the change will affect Bulgaria and its producers as soon as possible. The other will be the so-called. Green public procurement-the idea of the Commission to give priority to companies fulfilling the requirements. It also identified priority materials-including agricultural products and waste, wood and paper, plastics and metals, which would be useful to accelerate the transition to a circular economy. Packaging, food, electronic and electrical equipment, furniture, buildings and construction are defined as priority sectors. Thus adoption of the circular economy principles and the introduction of adequate business models would be a sustainable competitive advantage in the context of Michael Porters theory, as well as a key precondition for competitiveness of Bulgarian companies on the Single market. Private investment in Bulgaria in the Group of economic sectors relevant for the circular economy is estimated at 81 Million Euro or 0.18% of the country's GDP. This commented during the Forum "Circular economy and environment, 2018" Deputy Economy Minister Lilia Ivanova[7]. She clarified that these numbers are above the European averages, amounting to 0.12 per cent. In these sectors are employed about 59 thousand persons and the added value created is around 521 Million Euro and increased by 1.2 percent.

With the help of EU funds, Slovenia is reaching its recycling targets and the citizens of Slovenian capital Ljubljana have better, more sustainable waste management. Since joining the EU, the Slovenian capital has boosted separate collection and recycling, and reduced the amount

of waste sent to landfill by 59%. It also invested in prevention and reuse. Ljubljana now generates 41% less waste per capita than the European average and decided not to build two new incinerators as originally planned. One of the key elements of the integrated waste system is the Ljubljana Regional Waste Management Centre. This EU-funded project started as a facility for 17 municipalities. Later, 20 more municipalities joined, renouncing the need for an additional treatment plant.

There are business models that are focused on using waste as resources. They promote cross-sectoral links by creating markets for secondary raw materials. In this way, the use of energy and materials can be reduced during production and subsequent use, as well as to facilitate activities to prevent the conversion of by-products into waste, the so-called. There is a likelihood of a "boomerang effect" – prolonged use of relatively ineffective products, but this is a phenomenon that depends heavily on the way of use.

Ecodesign

Two approaches can be distinguished: the re-design of products based on gradual improvements of existing products and new product design, representing the development of new resource-friendly products that can be restored, Upgraded and recycled. As an example over 500 IKEA products, called "primary material", can be repaired, maintained, improved, recycled, donated at the end of their lives. This creates tremendous opportunities and advantages for IKEA. One example is bamboo and hyacinth products – many sustainable renewable materials, whose demand is continually growing [8].

When designers from the multinational Nike try to produce shoes in a safe way for the environment, they initially failed because they relied on traditional materials and specifications. Nike overcame this obstacle by developing a series of product engineering concepts that aim to reduce the environmental impact by eliminating waste, using environmentally sustainable material and eliminating production processes.

The company Kaiser Permanente builds new hospitals with rubber floorings (instead of vinyls) and carpets without PVC, thus encouraging the health facilities to massively reequip their premises, and the company itself receives orders for their production. In this way, it expects to get

a long-term return from its more environmentally friendly production and increase its market share

Science-Research parks may also offer a number of shared resources, such as incubators, programs and collaboration activities, uninterruptible power supply, telecommunication hubs, reception and security, management offices, bank offices, convention centers, parking, and internal transportation[9].

Vertical Farms

This innovative agricultural model shortens the distances for deliveries and reduces the carbon emissions today. Consumers face a dilemma: we all want the food we enjoy to be accessible throughout the year and at a price we can afford, but we are increasingly aware of the serious impact of our expectations on the environment – in the form of long-range deliveries. In recent years the agricultural model of Vertical Farms has been successful and large-scale in northern Lincolnshire, Great Britain. The largest vertical farm in Europe, Jones Food Company (JFC), was built on the site of an old freezer store with high ceilings. That allow crops to rise to 17 floors. "Soil " is a term unknown to the enterprise.

From photovoltaic solar panels to kinetic energy adapters for stationary bicycles that generate electricity from pedaling

Entrepreneurs are taking advantage of the green revolution by finding renewable energy solutions. Since we use energy for almost everything, the recent trend towards greener, more sustainable technology is creating many opportunities for entrepreneurial-minded individuals.

The business models of PepsiCo Inc. and Walmart

Companies that implement a proactive business recycling strategy not only need to take these factors into account continuously, but also to take ' green ' initiatives that can lead to additional business costs, but have a long period of payment. For example, PepsiCo Inc. perceived sustainability as a benchmark for determining capital expenditures. Integrating sustainability into corporate marketing and communication policy is particularly important for attracting and informing stakeholders, including customers, employees, investors and regulators.

One of the brightest examples of a proactive sustainable strategy can be given with the American Walmart company. It takes the

initiative to create a “sustainability index” to assess all consumer products for their environmental impact. Walmart is not participating in the index because it does not produce but sells the products and participates in its financing and creation. The scoreboard leads to a more transparent supply chain, stimulates product innovation and provides consumers with the information they need to assess the sustainability of products. Thus, manufacturers of competing products sold in the chain are stimulated to bring in the production and design of their products innovations that will increase recycling, which drives the production area as a whole, to pay attention to these new business opportunities

The Struvia technology

The Struvia technology, developed by Veolia Water Technologies, reused phosphorus from wastewater, a substance that is becoming scarce in Europe. The phosphorus sludge is excreted in water treatment plants and can be packaged and sold afterwards to be used again in agriculture as fertilizer. In partnership with the French merchant of goods "Do It Yourself" Castorama Veolia creates a completely recycled kitchen countertop. It is created from residual wood and plastic, and the product is recyclable and after it ceases to be used. All this does not hinder the company's revenues-they are over 24 billion Euro for 2016.

The double life for Remixshop.com's T-shirts

Sometimes, heavy machinery and chemical compounds are not needed to make the circular economy happen. Second hand clothes are a simple but easily accessible method to save resources, and to limit textile waste. "The business of Remixshop.com is based on recycling and reuse of good clothes and accessories". Second hand clothes are a basic but good way to solve this problem. "In Western Europe, for example, there is a culture of collecting/disposing of unnecessary belongings in certain places. Then the belongings, in our case-the clothes are collected by recycling companies, which divide them by type and quality. The best quality-clothes with small or no traces of wear, from brands from the entire price range of the brands: budget, middle level and luxury, are resold back to Europe, the USA and Russia. Other quality products are sold in other parts of the world or recycled to make materials:

fabrics, filaments or alternative derived materials, such as car interior seals and the like. According to some researches the fashion industry is the second most polluting in the world with the long chain of material extraction, production and transport.

Shared economy

Shared travel, popular in our country, can also be attributed to the circular economy. Statistics in Denmark show that a car transports an average of 1.4 people and stands parked around 23 hours a day. Entrepreneurs create the GoMore platform through which they sell empty seats in cars. Since 2005, millions of users have visited it, and 300 thousand seats have been occupied.

The model of Carlsberg

Another successful example-one of the tribulations before the producer of beer Carlsberg is the bottling process, which is responsible for 45% of the carbon emissions, ingenious from the company's factories. The company began to partner with the Danish Technical University, with whom they managed to create the first in the world completely decomposed beer bottle. It is produced from wood fibers.

CONCLUSION

The current stage of development of human society is marked as a whole by massive industrialization. demographic boom, progressive depletion of natural resources, especially rare earths, low recycling of waste products and insufficient landfill area waste. The circular economy concept is developed by leading scientists and implemented as corporate business models. It is supported by plans and public documents at national and community level as key prerequisite for sustainable development and the preservation of the planet in combination with acceptable economic growth and prosperity. In view of the development of regulations, such as the introduction of green public procurement, companies working on circular economy principles would have strong competitive advantages in short term.

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MODEL FOR DETERMINING THE IMPACT OF THE EUROPEAN FUNDING OF BULGARIAN MUNICIPALITIES ON THE MAIN ELEMENTS OF FOREIGN DIRECT INVESTMENT PROCESS

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ABSTRACT

The aim of the article is to track the funds absorbed by the Bulgarian municipalities from four operational programs in the period 2007-2018. and developing a model for determining the impact of these funds on elements of the investment process by area. Official statistics are used, the Information System for Management and Monitoring of EU Structural Instruments, the National Statistical Institute and others.

Key words: *operational programs, real payoffs, investment environment, foreign direct investment*

INTRODUCTION

With the idea of achieving a higher economic development, the strategic plans of the municipalities consider the improvement of factors that can be identified as influencing in the process of investor choice. The main part of this section includes infrastructure, administrative services, the availability of skilled workers, tax deductions. The funds from the operational programs "Environment", "Regional development", "Administrative capacity" and "Human resources development" in the first programming period i.e. years 2007-2013, enable municipalities to influence the quality and The amount of these factors.

The economic zones that have been formed in the last years, which attract the largest amount of foreign investments are not accidental in municipalities with good transport accessibility- to ports or to the line of Trakia AM. The good state of the roads is a condition for facilitating the movement of raw materials and production, as well as the mobility of the personnel, therefore the improvement of the transport infrastructure in the municipalities is one of the necessary conditions for attracting investments.

EXPOSITION

Impact of the resources absorbed from EU funding on foreign direct investment

The figures for the resources drawn up in the first programming period by the municipalities in the four programmes examined show that the funds for the Water Supply infrastructure are more than nine times more than the transport, and the improvement of the urban environment has received three times more. However, the outcome of the analysis of the data collected shows a significant correlation between the European funds ' built infrastructure and foreign direct investment in the first programming period.

By accepting the resources used to improve transport infrastructure (here are included roads, streets, as well as landslides) as a factor, and Foreign Direct Investments (FDI) as a consequence in the equation $y = a + b \cdot x$, therefore $y = 983,59 \cdot x - 1378,7$, as a result the coefficient $a - 1378,7$ indicates, what would be the value of FDI, if there are no funds used for transport infrastructure, and the coefficient $b = 983,59$ shows how much the value of FDI will change if we change the amount of the funds drawn by one. Thus, with the help of regression analysis, the relationship between the two

phenomena measured in strong scales is visible. Looking at the power of this connection, the coefficient of determination R^2 is equal to 0.4672 and shows the percentage of the change in the result, which is due to the change in the factor. The correlation coefficient in this study is 0.68352 which indicates significant correlation.

As a result of comparing the FDI values in years 2007, 2015 and 2017, one can identify a significant growth in five of the districts: Pazardzhik, Blagoevgrad, Gabrovo, Dobrich and Kardzhali. From the 21st place in Bulgaria in FDI in the country in year 2007, Kardzhali District reached the 12th place at the end of year 2017 and an amount of investments of 143.5 million Euro. During the first programming period, the highest volume of the funds actually paid to the municipality was effected in years 2013, 2014 and 2015. These are the years in which FDI growth is reported. The municipality has the largest share of investments in the area. The highest value, during the period considered, was that of investment in industry which in year 2015 was 62% of all investments. Two years later, this share of industry declined to 55.3%.

The realization of projects on the territory of each municipality leads to increased demand for raw materials, as well as recruitment of labor and the growth of wages and turnover. Starting from year 2013 in Kardzhali region has been reported growth of average salary income - from 1983.- BGN average per person to 2153.- BGN in year 2016. Another indicator as the unemployment rate recorded a fall from 7.0 per cent to 1.7 per cent and the turnover in the area showed growth [1]. The municipality of Kardzhali is also working towards improving the administrative capacity, one of the problems to overcome the conditions for attracting FDI. The power of the relationship absorbed funds to improve administrative capacity - FDI in the municipality, shows a coefficient of determination equal to 0.3809, and the correlation coefficient is 0.62 therefore there is a significant correlation.

One of the biggest foreign investors in Kardzhali is the Turkish company "Teklas", which produces mainly different types of rubber parts for automobiles. Since year 2006 four of the manufacturer's factories invest in Bulgaria over 150 million Euro, and the investments are on the territory of the municipality. According to company's data, over 2550 people work in these factories. A total of eight vocational secondary schools in the municipality allow for qualification of the personnel needed in the

different stages of production. "Teklas Bulgaria" is an example of cases where a foreign investor, after launching new production capacities, attracts a part of its suppliers on the territory of the investment, which leads to additional provision of new jobs. Among the investment decisions of the company is the creation of a research innovation center. For the period 2007-2011, no R&D costs were incurred on the territory of Kardzhali region, while in the following year 2012 were reported 110000.- BGN and in 2016 the figure is already 3168000.- BGN [2].

A growth in R&D expenditures is also recorded on the territory of the Pazardzhik region. The realisation of these costs started in 2013, when the decrease in the unemployment rate was noticed and started in the area, which from 13% went down to 6.4% in 2017. In the years 2013 and 2014 the area has been noted by the largest volume of realized European projects and funding, which resulted in an increase in the average list of employees. In this region, as in the Kardzhali region, the active period of absorption of European funds marks a growth in turnover. The largest share of FDI in the area is concentrated in the municipality of Pazardzhik. The location of the municipality can be defined as strategic as it is close to two airports, motorway and trans-European corridors. The fact that the zone has been established 30 years ago and that is why the necessary infrastructure is built, complements its attractiveness. Among the big foreign investors are Duropack, part of the DS Smith Group, and among the newest is the German Kostal, which specializes in the production of electronic and mechanical components for the automotive industry. After the opening of the first company in Smolyan in 2011, a rapid pace of development and sustained losses were reported, which was due to the expansion and the significant shortage of manpower. As a result company chose another location for its second plant.

During the first programming period the municipality of Pazardzhik has focused efforts mainly towards improving the administrative capacity, increasing the attractiveness of the urban environment and renovation of the Water and Sewerage facilities. In 2009, the and 2010 the municipality implemented a project aimed at speeding up the processes of decentralisation of the municipality of Pazardzhik by studying, analysing and implementing successful European models in the field of sustainable development of

economic centers, encouraging small and medium-sized Businesses and attracting investment. The total value of the funds actually paid in the first programming period to the municipality for projects supporting improvement of the urban environment, the transport and Water Supply infrastructure is 13.47 million BGN. Since no information is available on the size of FDI in the municipality after 2012, an analysis is possible for the impact of the European funds drawn against the FDI realised in the period 2009-2012. The influence shows a coefficient of determination equal to 0.2331, and the correlation coefficient is 0.48 or there is a moderate correlation.

Gabrovo is also among the areas that show rapid growth of FDI-from 19th place in Bulgaria in 2007 to 9th in 2017, the area was one of the few in the country with a relatively big share of enterprises with more than 250 employees in the total number of enterprises in the area, which equals to 0.3%. After 2011 when the unemployment reached a level of 9.9%, this indicator marked a smooth decline in subsequent years, up to 5.2% in 2017, and the turnover and output values were rising[2].

In the first programming period, the municipality of Gabrovo realized 35 projects with funding from the cohesion policy of EU. An overview of the activities involved shows a major focus on improving living conditions for residents, thereby reducing their migration. The presence of qualified personnel who are preparing in the Technical University of Gabrovo and creating prerequisites for their remaining on the territory of the municipality leads to concentration of highly qualified workforce, which in itself is a condition for attracting of FDI.

In common between the areas discussed above with a rapid growth rate of FDI, in addition to the good location and availability of manpower, the implementation of projects funded by Operational Program Regional Development 2007-2013 for the preparation of an integrated plan for urban regeneration and development. This plan is based on the concept of defining three main areas on the territory of big urban habitats: public, social and industrial. The application scheme was opened in 2010 and the performance indicators of the programme take into account the full implementation of all 36 contracts foreseen and concluded in the cities of Bulgaria. The development and implementation of integrated urban regeneration

and development plans was funded by the scheme BG161PO001/1.4-07/2010 "Support for integrated urban regeneration and development plans". The carried out additional projects outside the impact zones, which contribute to improving the city's functional links with its periphery. Eligible projects outside the impact areas were projects related to support areas with potential for economic development, cultural, sporting, social and educational infrastructure. Amendments to their Integrated Plans for Urban and regional Development have submitted a total of 15 municipalities as follows: Bourgas, Gabrovo, Silistra, Lovech, Blagoevgrad, Stara Zagora, Razgrad, Svishtov, Smolyan, Kazanlak, Karlovo, Panagyurishte, Pleven, Pazardzhik and Vratsa. As a result the industrial zone of Montana town manages to attract more and more investors. In combination with the good location and the availability of sufficient free labor, FDI in the area began to show growth, however in less large volumes, visible in other areas of the country.

The creation and development of industrial zones on the territory of areas in the northwestern region of Bulgaria, following the example of many other areas, gives the opportunity to attract foreign investments, which will lead to growth of production, decreasing the unemployment rate, the decline in population migration levels and the growth of regional GDP per capita. The funds actually paid in implementation of European projects are an investment in improving the attractiveness of these regions. To maintain and develop the potential of regions to attract foreign direct investment, continuous work and investment is needed in order to improve infrastructure, transport accessibility, improve the quality of education in the region, ensuring good interaction with higher education institutions with a view to preparing highly qualified staff and providing a good living environment for the population.

A model for determining the influence of the European funding on the main elements of the investment environment of the Bulgarian municipalities

In order to examine the impact that the funds actually paid out of the four operational programmes under consideration, in the first programming period 2007-2013, the investment environment in the municipalities requires the

creation of a model taking into account the impact on several essential elements of this environment. For this purpose, a major part of the "traditional" factors for attracting investments divided into three groups: infrastructure, workforce and production development are considered. The National Statistic Institute database allows viewing by areas, as there is no practice for declaring information by individual municipalities.

The labour force factors group includes the quantitative indicator "population density of working age" defined as the proportion of the working-age population relative to the area concerned, the qualitative A sign "Number of graduates" in the year concerned and "average annual salary of employees by employment and business relationship".

Due to the lack of data to show the development of the Plumbing infrastructure, which is the subject of funding from part of the operational programmes, the infrastructure factor includes the quantitative indicator 'Total length of the Republican road network' and The quantitative indicator 'Total length of the Republican road network with asphalt pavement' for the territory of each of the areas concerned.

The production development indicators used are 'output' and 'turnover' in million BGN. In order to assess the impact not only on each of the factors listed, but also to consider the average rating for all, a scale with an estimate of "2" to "6" is determined according to the influence of the correlation coefficient as follows:

0 < R < 0.3 – Low Correlation – rating 2;

0.3 < R < 0.5 – Moderate Correlation – rating 3;

0.5 < R < 0.7 – Significant correlation – rating 4;

0.7 < R < 0.9 – High Correlation – rated 5;

0.9 < R < 1-Very high correlation- rating 6.

Using the regression analysis for modelling, the form of the dependence on the resultant signs of a single factor-a sign (independent variable), which in this case is the 'amount of funds actually paid' of the four Operational programmes under consideration, the following results evaluated by the specified methodology were calculated (Table 1). The result of applying the model show that in more than 38% of cases the absorbed funds are in significant correlation with the resultant signs, in over 34% of the areas they are moderate, at just above 19%-in weak, and only at almost 8% are in high correlation. It is possible to have distorted results in some areas due to lack of data on the number of graduates or in the absence of changes in indicators concerning transport infrastructure. In order to have a comprehensive model of determining the impact of the utilized resources on the main elements of the investment environment, it is also necessary to consider the interaction with the factor 'institutional potential of the municipality', for which it is not possible to assess with a quantitative indicator.

The analysis carried out shows a moderate correlation between factor and result indicators by average. European structural and investment funds have an impact on key elements of the investment environment in the regions other than the impact on foreign direct investment. In this regard, it is necessary to take into account the impact of the elements examined on the amount of foreign direct investment attracted. For the purpose of the study, the influence of "number of graduates" and "overall length of the Republican road network with asphalt pavement" is considered.

District of Bulgaria	Population density of working age	Number of persons graduating from higher education	Average annual salary of employees	Overall length of Republican road network	Total length of Republic an road network with asphalt paving	Produced output	Turnover	Average rating
Burgas	5	3	5	5	5	3	2	4,00
Sliven	4	2	4	4	4	3	2	3,29
Yambol	4	4	3	5	5	4	4	4,14
Stara Zagora	5	2	5	5	5	5	5	4,57
Vidin	5	0	5	5	5	4	2	3,71
Vratsa	4	2	4	3	3	2	2	2,86
Lovech	5	4	5	5	5	4	3	4,43

Montana	3	0	3	2	2	3	3	2,29
Pleven	5	2	6	6	6	5	4	4,86
Veliko Tarnovo	5	2	5	3	4	4	5	4,00
Gabrovo	4	3	5	5	5	4	4	4,29
Razgrad	5	4	6	5	5	5	5	5,00
Ruse	5	4	6	0	0	5	5	3,57
Silistra	5	4	5	0	3	4	5	3,71
Varna	2	5	5	4	4	2	2	3,43
Dobrich	4	2	5	5	5	5	5	4,43
Targovishte	3	0	2	3	3	2	2	2,14
Shumen	5	2	6	6	6	5	5	5,00
Blagoevgrad	4	5	4	2	2	3	3	3,29
Kyustendil	5	0	5	5	5	5	5	4,29
Pernik	0	4	2	2	2	2	4	2,29
Kardzhali	4	3	5	5	5	3	4	4,14
Pazardzhik	4	0	5	0	4	4	4	3,00
Plovdiv	2	3	2	2	2	3	3	2,43
Smolyan	5	3	5	0	5	2	3	3,29
Haskovo	4	3	4	2	2	4	4	3,29

Table: 1. Source: MIS (the survey does not include the data for Sofia City and district

Where, in the regression analysis, a simultaneous influence of more than one factor is studied, the dependence can be modelled as a multiple, the equation being the type:

$y = a + b_1x_1 + b_2x_2$, where

- y is the theoretical value of the resultant sign (in this case the amount of FDI in BGN);
- x_1 and x_2 are the measured value of the factor signs (in this case "total length of the Republican road network with asphalt pavement" and "number of graduates");
- b_1 and b_2 are the coefficients in the regression equation;
- a is the free member.

By replacing the data for the period from 2008 to 2015 year in the equation, the results show the following data:

ANOVA

	<i>df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>			
Regression	2.00	1348786.11	674393.06	2.39	0.19			
Residual	5.00	1410284.31	282056.86					
Total	7.00	2759070.43						

<i>Regression Statistics</i>	
Multiple R	0.891555048
R Square	0.794870404
Adjusted R Square	0.712818566
Standard Error	729.9531435
Observations	8

Table 2 Linear regression analysis

The correlation coefficient R is 0.89, and the adjusted coefficient of determination is 0.71. The coefficient of determination is 0.79, which means that 79% of the total dispersion of the resultant sign can be explained by the variance of the factor.

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	15659.22	8669.61	1.81	0.13	-6626.71	37945.15	6626.71	37945.15
X Variable 1	-505.46	265.13	-1.91	0.11	-1187.00	176.07	1187.00	176.07
X Variable 2	1.45	0.94	1.55	0.18	-0.95	3.86	-0.95	3.86

Table 3. Dispersive Analysis

The data from the Dispersion analysis (Table 3) is used to check the significance of the model. The part of the variance due to the influence of the factor is 10323524 and shows the power of dependence between the phenomena in question. The second part of Table 3 contains data on the coefficients of the regression equation and their statistical significance. The Coefficients column specifies the values of **a** and **b** in the equation $y = a + b_1x_1 + b_2x_2$. The free member (a) is a negative number and the corresponding value of the t-criterion Student is 1.34. The level of significance is 0.24, which is more than 0.05, therefore the dependence is statistically significant. The influence of the two factors varies according to the analysis data. Increasing the factor of "Number of graduates" by one unit leads to an increase in the result of FDI with 0.24, and the increase in the "Total length of the Republican road network with asphalt pavement" with one unit leads to Increase in FDI by 2.70 units. The impact that the transport

CONCLUSION

As a result of the the study one could define the opportunities of municipalities to improve the investment environment with the help of EU funding and the m operational programmes. The main priorities are focused on the following:

- Improvement of ransport infrastructure, plumbing facilities;
- Creating better learning conditions, by upgrading educational infrastructure;
- Increasing the capacity of the administration and improving living conditions by upgrading urban areas. The projects implemented in this direction create conditions

for business development, qualification of the human rессources, regulation of migration, concentration of the workforce and increased incomes.

- Elimination of corruption and reduction of bureaucratic obstacles. In the process pf absorbtion of funding eventual poor controllability of financial flows, budget shortages could be solved by proper strategic controlling system[5];

- Fostering creation of industrial zones;
- Supporting investment in improving the qualities of education, as well as in building a relationship between business and educational institutions;
- Overcoming disparities in the development of regions and ensuring adequate transport links with quality flooring;
- Providing conditions for the preservation and attracting back from abroad of the highly qualified personnel.

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TRENDS AND CHALLENGES TO THE RESTAURANT BUSINESS IN BULGARIA IN THE CONTEXT OF HEALTH STYLE OF LIFE

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ABSTRACT

The dynamics and business nature of modern life style have a decisive influence on people's eating habits. The established trend is clear - with increasing disposable income, increasing job commitment and the dynamics of daily health style of life, more and more people tend to eat outside their home as clients of dining and entertainment establishments.

The subject of the research in this paper is the restaurant business in Bulgaria. The study focuses on trends, challenges and development prospects in the health style of life. The aim is to set guidelines for improving and increasing the efficiency of the restaurant industry in Bulgaria.

The main task of the restaurant business is to satisfy the needs of the customers, which guarantees its prosperity.

Keywords: *restaurant business, trends, challenges, health style of life, strategies for success.*

INTRODUCTION

Changes in the modern diet are determined and influenced by various factors. The modern man leads a sedentary lifestyle and work with low physical activity. However, his eating habits have not changed much - he has been eating as much as his more active predecessor since the late 19th century. Now the population of the developed countries consumes more than they need, which is often enriched with various nutritional supplements. At the same time, it consumes less physical energy, which does not help absorb excess food. The results of this diet (elevated status) are accompanied by biochemical stress for the body.

Changes in the demographic structure of the world population reveal a picture of a growing relative share of people in the age groups of 30-45-year-olds and over 60-year-olds. The reported aging of the population thus influences the needs, desires and demands of culinary production. Highlighted as grown-up groups form a solvent segment that has the time and desire to visit dining establishments. These individuals need communication but require special attitude and attention with regard to the dishes offered.

On the other hand, increased urbanization and urban population growth are also affecting eating habits. The number of working women is increasing (70% of women aged 25-44 years in developed countries work). The greater

participation of women in business and social life necessitates a change in eating habits, in the ways of culinary processing, as well as in the philosophy of food preparation, production and supply and organization of out-of-home meals.

The professional structure is changing (increasing the relative share of employees at the expense of workers and reducing the volume of manual labor), whereby consumers are more educated, with greater knowledge, more concerned about their health, but also more expedited and engaged in their work at the expense of nutrition. It decreases physical activity but increases the caloric value of the food consumed.

TRENDS IN THE RESTAURANT INDUSTRY IN BULGARIA

The Bulgarian restaurant product is still characterized by its seasonality, which is not particularly effective for the restaurant business. The working hours of most restaurants depend on the seasonality of the hotels. Due to the seasonality there are significant differences in the use of the material and technical base - the accumulation of large masses of people within a short period of time and the total unusability of establishments and facilities during the rest of the year. As a result, resource depletion is severe. During the high season, increased use leads to the logical aging of the facilities. But even

during the off-season, there is depreciation, which requires continuous investment of funds for renovation, repairs and maintenance. These costs are particularly high in terms of the material and technical base of sea recreational tourism in the winter, since then it is almost completely unusable and carries its losses.

The problems faced by the Bulgarian restaurant business are first of all related to the motivation of the service personnel, their preparedness and ethical standards. The quality of the deli dishes depends a lot on the quality of the products for their preparation and then on the skills and qualifications of the cook. Poor facilities are also a major problem. Investment in the restaurant industry in recent years has led to a good positioning of the country at European level. Some improvements have also been made in infrastructure development, including the construction and repair of roads to major resorts (Sunny Beach, Velingrad, etc.), which is why part of the industry no longer poses bad roads as a major problem for the sector.

It is necessary for the restaurant business owner to know and understand their main competitors and to try to predict their actions. He must have the ability to quickly adapt his strategy to the changes in the environment and seek to achieve a long-term advantage over its competitors. But in order to arrive at the right strategic choice, a company needs to go through a whole body of research and analysis to equip itself with effective tools to perceive, understand and predict environmental behavior and bring out strengths and weaknesses of the company.

In the battle for market share, restaurants have little choice but to focus on other means of developing more efficient demand. In an environment of fierce competition, it is vital that restaurants follow a marketing strategy that seeks to reach market segments that the restaurant has not focused on so far. Such a strategy can either attract a new type of customer to traditional ones or replace the previous market segment.

New technologies, such as creating a menu page, photos and restaurant information, an online home order panel, are essential for any restaurant. There are currently many websites that provide information, addresses and reviews on restaurants around the world. At these sites, users can give their opinion about the restaurant, rate it from 1 to 5, and these ratings provide other users with information about the restaurant, and if the rating is good, customers who are in

the area or are curious about the new restaurant, they can visit it, without unpleasant surprises.

Every restaurant manager has to keep track of consumers' evaluations of their restaurant, because that is how the virtual image of the restaurant is built, and nowadays it is difficult for people to make their own decisions without consulting the online audience.

Restaurant owners will continue to rely on management for the next ten years. Food is very important for the customers, but proper management, qualified and trained staff, pricing, marketing policy and quality restaurant product are determined by the management.

The dynamic online environment, with the thousands of opportunities it offers, manages to accumulate an increasing number of people, turning an artificial environment into a working and profitable business. This is the magic of start-up companies.

The trend is towards the development of online food delivery platforms. What these companies do is support restaurants and their marketing in the online marketplace. Proper positioning of food chains increases their sales through online and mobile platforms, providing them with ever-evolving technology and analytics. In addition to the good business practices that international companies follow, people with years of experience in their field of activity are behind them.

Another trends are chains who offer a healthier foods. Bulgarian restaurants already offer vegan, eco-friendly, gluten-free menus. All of this is thanks to pushy vegans, vegetarians, paleo diet lovers, the growing number of diabetics, and the few vicious star-chefs who are addicted to vegetables.

Following the information on the mass production of GMOs, more and more people are doubting the quality of the food they consume. Most of them want to consume freshly prepared food with the so-called organic products. The wave of healthy restaurants is still making its way, because the cost of the products used is much higher than in normal restaurants. In Bulgaria it is difficult to find organically grown products, if they are located they are some distance away from the restaurant, and their transfer would further increase the price of the final product. Modern technologies for optimizing the restaurant industry in Bulgaria - The Internet offers many options for promoting the restaurant product:

- Creating a website;
- Creating a Facebook fan page;
- Creating a Google+ profile;
- Advertising banners on tourism and hotel booking websites;
- Advertising banners on airline ticket sales sites;
- Creating mobile phone applications with home ordering module.

TRENDS IN THE GLOBAL RESTAURANT BUSINESS [10]

❖ Local sustainably produced foods

In response to globalization, hotel guests today want to maximize their immersion in the local environment, to "merge" with the locals. This also leads to a demand of hotel guest for specific local dishes or foods and especially those who are produced in a sustainable manner. Bars are beginning to offer massively regional craft beers and wines from small local cellars, the menus are filled with specialties and dishes from the local cuisine. The Four Seasons - The Taste of Place initiative, for example, encompasses a whole range of culinary experiences geared towards guests and prepared in partnership with local suppliers, farmers and distilleries - from private tours to local breweries and wineries to fishing trips and from farm to farm bars' seminars for beginner mixologists. In Parma, Italy, the so-called 'Parma Gastronomic Tour' is available for guests of the Four Seasons Hotel Milano, while visitors to the Four Seasons Resort Koh Samui in Thailand can participate in the CoCoRum Experience.

❖ Natural or minimally processed foods

Refined salt and sugar, hydrogenated fats, preservatives, colors, nitrates and sweeteners are harmful and even children are aware of this now. Until proven otherwise, customers will increasingly look for natural, minimally treated foods. The bloom of organic shops and farmers' markets around the world in recent year's further support this trend.

❖ More plant foods

Around the world, animal protein is losing ground at the expense of plants, including seeds and nuts. Chefs at leading restaurants are responding to this trend and updating their menus as customers now demand for more and more vegetarian and even vegan dishes.

❖ Healthy sandwiches and snacks

Fast food is quite a trend nowadays, especially among the so-called. Millennials and

Generation Y (born between 1980-2000). However, this generation is not a fan of McDonalds sandwiches. If they are going to be sandwiches, they must be healthy and have minimal processed ingredients in them. Fruits, nuts and yoghurts can also be classified as healthy energy snacks. Some of the more progressive restaurants even start to offer menu items that even contain algae and cashew or almond milks.

❖ Mobile Food Ordering Apps

Like many other eating trends, this one is due to young, fast-paced, tech-savvy travelers. During conferences, for example, delegates can use the restaurant's mobile app to enter an interactive menu from which they can order freshly prepared food and take it without waiting in line. Such applications can easily be used for ordering stands or meeting rooms.

❖ Signature cocktails

Cocktail culture is booming, and innovative restaurants are putting more emphasis on offering unique, original cocktails to their guests. Fairmont Hotels & Resorts has a long list of custom cocktails. The luxury chain invites award-winning bartenders and mixologists to collaborate on recipes, then includes their "creations" in their hotel menus. Kimpton Hotels & Restaurants, on the other hand, use avant-garde ingredients to offer cocktails with exotic flavors and aromas. The list includes roasted grapes, salted bananas, pureed red peppers, peas and corn. Kimpton bartenders do not hesitate to mix ingredients in their cocktails, such as fermented kombucha, ginger beer or coconut milk kefir.

❖ Meeting with the head chef

To offer a unique experience for their guests, many restaurants today take the experience of cruise ships and include as an option the opportunity to meet the chef. For example, guests at the Grand Residences Riviera in Cancun (Mexico) can dine with Chef Jan Michel Kozic. During the Chef's Table attraction, guests can watch "Behind the Scenes" as Chief Kozic prepares a full course menu and then receive a copy of the menu which is also signed by the Chef. At Winvian Farm, Connecticut (USA), Relais & Chateaux, guests are invited to a tour of the resort's organic farm, during which they can pick up vegetables and fruits that can later be cooked by the chef and included in their dishes and menus.

❖ Self-service is the new room service

That's right, the number of guests who prefer to take their own food for the room or on the way to the airport is increasing. Grab-and-Go sentiment is moving so fast that many hotel complexes are even abandoning the traditional restaurant at the expense of a warm fast food stand and an adjacent food and beverage store.

**CHALLENGES FOR THE
RESTAURANT BUSINESS IN BULGARIA
IN THE CONTEXT OF HEALTH STYLE
OF LIFE**

The restaurants in Bulgaria operate in a developed market economy, which means well-regulated business. This is achieved through legal and regulatory provisions and practices, forcing each company to follow closely the active legal rules of its national and regional priority markets, directly or indirectly affecting the business. In recent years, there has been a trend towards widening income disparities between different population groups. This also necessitates a corresponding differentiation of markets according to differences in nominal incomes.

Restaurateurs should pay more attention to low-income consumers as they are the majority of the population in the country at the moment. The supply is carried out in suitable venues, at the lowest possible prices, with an appropriate range and relatively good quality of products. High-income consumers expect and seek higher quality and unique products, a better atmosphere in restaurants, prestigious territorial location, etc., which responds to their aspirations for higher social status and recognition. Tourism, trade and services are traditionally important and important for the overall economic appearance of Bulgaria. The policy of the country, in addition to the traditional sea recreational tourism, is to develop specialized types of tourism, such as conference and business, spa tourism, cultural and historical tourism, eco tourism, alternative and hobby tourism. The prerequisites for attracting tourists are location, natural resources, favorable climate, mineral waters, low prices. Tourism is a leading sector - an engine for the national economic potential, as it stimulates the development of all other sectors, and the restaurant is a primary service, Bulgarian national cuisine is very often the reason and purpose for visiting Bulgaria.

**STRATEGIES FOR THE
DEVELOPMENT OF THE RESTAURANT
BUSINESS**

Businesses operating in the restaurant sector can use different strategies to achieve their goals. V. Blagoev describes basic strategies explored by Igor Ansoff. The approach is known as the Ansoff Matrix, and is based on considering the opportunities that are a result from a commodity-market relationship.

The Ansoff matrix has four quadrants, formed based on whether the company intends to sell the goods offered so far or intends to sell new products, and depending on the markets - whether the current market will be developed on the basis of existing strengths and weaknesses, Reporting threats and opportunities.[2]

Table 1
Ansoff Matrix

Market	Current stocks	New stocks
Current Markets	Market development strategy	Product development strategy
New Markets	Market penetration strategy	Diversification strategy

The Market development strategy is implemented through appropriate pricing, using discount coupons. Improving market positioning is an essential element. One of these trends is the secondary market expansion, which is reflected in the entry into smaller markets, where competition is weaker, wages are lower, land and real estate prices are lower, rents reduce costs to traders, there are fewer constraints on business development and expansion, etc. This allows traders to improve their competitive position in these markets and stabilize their financial position.

The Product Development Strategy is appropriate for new products. The business activity is expressed in the specialization of the traders in offering individual products for strictly determined niche market segments. As consumers search for products that fit their lifestyle, income level, etc., marketers are forced to target their products to a even smaller group of consumers. Another reason for promoting their business is the desire of businessmen to offer well-known brands, increase their image, and reduce costs by using smaller in size stores and more.

The diversification strategy is the adaptation of new products and services new to the organization's activities. According to Bodurova [3], diversification is concentric, vertical, horizontal and corporate.

Concentric (convergent) diversification strategy applies to new activities or products that are not offered by the business but are related to the technology or marketing activity. The goods are intended for new markets or for new consumers in the existing market, using the synergistic effect. Vertical diversification is about capturing suppliers' products Upward diversification and downward diversification are present as well.

Horizontal diversification is observed when new products do not fit into the line of the main products offered, but aim to improve and increase the range and product nomenclature. Upward diversification and downward diversification are observed as well. It is intended for already existing customers

Conglomerate (corporate) diversification is undertaken for new business, unrelated to the current one, for different users and using different technologies.

Diversification can be further connected to (where the activities carried out are in sectors of the industry in which the organization operates or there are other links) and disconnected (when the activities are heterogeneous or in different industries or sub-sectors).

Growth management strategies are the strategies of traditional, integration and diversification growth:

- traditional growth: deep market penetration, market expansion, product refinement;
- integration growth: forward integration, backward integration, horizontal integration;
- diversification growth: concentric diversification, horizontal diversification, corporate diversification

Diversification growth is a consequence of seeking opportunities outside the usual business field in which the company operates, but in many cases it finds expression in expanding the existing market based on a new product. It is achieved through individualization of the supply; making continuous changes to all elements of the marketing mix to better adapt to the environment. The behavior of any restaurant business depends on a number of components, among which are the customers, competitors and the specifications of the organization itself.

Therefore, its development decisions are based on assessments of customer type, their specific needs, needs and demand, how they are served, including competitors and business opportunities. Setting organizational goals is also vital as its task is to determine the future growth of the organization, taking into account the desired and possible development of these components.

Diversification, as a strategy, can add value by pursuing a portfolio strategy, restructuring, transferring opportunities, and sharing resources. Diversification applied for other reasons is unlikely to add any value. Diversification which is motivated by the desire to combine risks or achieve greater growth is often associated with a spread of value.

According to Karadzova [5], concentric diversification is preferred over conglomerate as it gives opportunity in engaging in activities that create more value and at the same time is less risky.

The benefits of a diversification strategy can come from the use of excess production capacity, excess capital or available raw materials. Existing market resources, as well as the market position of the destination such as brand, prestige, etc., as well as the results of the research, can be advantageous in implementing a diversification strategy.

According to M. Porter [6], management strategies come down to three basic ones: "differentiation", cost leadership and focus.

Differentiation is targeted at the whole market in order to ensure a competitive advantage by offering a product which is different from the competitors. A differentiated product has its own uniqueness and creates some value for consumers.

Cost leadership strategy is about minimizing production and distribution costs. Using this strategy, the company can achieve a lower market price in comparison to its competitors, which in turn will lead to an increase in its market share [7]. Businesses that are focused on cost leadership strategy are constantly looking for ways to cut costs so that they can offer the lowest price on the market and expand their market share. Namely, improvement and introduction of more efficient production technologies, minimal marketing and advertising expenses, constant optimization of the distribution network and others.[8]

The focus strategy focuses the marketing efforts of the organization on a specific market

segment of users, with the main goal being to meet the needs and gain a leading position in the segment (niche)

According to Banchev [1], strategic decisions are developed within the framework of the formation of goals in the management of the organization. They follow the general philosophy of existence and development of the organization, as well as the accepted doctrines of its management.

The objectives may be economic and non-economic in nature. For example, market growth, rapid return on investment, there are constraints as well as priorities that the company must comply with. It is important to note the available resources (capacity, equipment, human resources, capital) in order to avoid bad planning. Here is the place to formulate a "Corporate Code Ethics code" through which regulations can be made within the organization and the outside world (customers, distributors, competitors, suppliers, etc.).[9]

In the battle for market share, businesses have little choice but to focus on other means of developing more efficient marketing. In an environment of increased competition, it is important for marketers to follow a development strategy and attract new customers.

Dachev [4] points out the following strategies - single price policy, differentiated prices, fixed price policy and high price strategy. The single price policy requires the same products to be sold to all consumers at the same prices. This policy is approved by buyers as it is socially fair. It is almost impossible for the consumer to make an informed choice among the many competing goods offered at different prices. Quite often, the wide range of products is disturbing and confusing to consumers.

Differentiated pricing policies for different consumers are shaped differently and through a different channel. In these cases, the company fixes a range within which actual sales prices are formed. This type of pricing requires a good awareness of buyers in the appropriate channel for conversion and control over the level of the final selling price. The long marketing chain can significantly increase the cost to the end user. Many businesses follow a fixed price policy for all consumers for the same products and under similar circumstances. Such pricing policies speed up transactions, simplifies the accounting, reduces the need for sales staff, and enable self-service sales. Some retailers have brought this

policy to the extreme by setting one or more prices for all products in retail outlets.

High price strategy is associated with high quality and image. High-priced strategies that provide targeted profit for a certain period of time and attract consumers to innovators are more common. The disadvantages are related to the likelihood that targeted revenue will not be provided or a competitive war will occur.

Cream strategies (There are two types of strategies known - quick cream picking and slow cream picking. The first is for short-life products - for example, "out-of-fashion" products aiming at gaining more market share in a highly competitive environment. The slow-cream strategy of the cream is aimed at introducing goods at low promotional prices for well-known products) and *price promotion* strategies are high and low pricing strategies.

The cream-picking strategy is characterized by initially high prices that attract consumers who are innovators, and then these prices reduce and cover the mass market.

Price promotion strategy (Visiting fast-food customers tend to accept a limited range of products, inconvenient location, and unfriendly shopping environment to find the best deal) creates a sense of savings in customers and increases the sales of other products in the product range. The basic principle is to announce slightly higher prices than accepted ones, after which a reduction is made from this price.

The factors that influence the formation of the strategy are specific to each independent restaurant business and change over time. The most important of these factors are:

1. Social, political, civil and regulatory norms

These are strategic limits, norms. Their adoption limits to some extent the choice of strategy. Restrictions are from different countries - different social groups, public opinion, political events and more.

2. The attractiveness of the industry and the conditions of competition in it is a factor determining market position and choice of competitor strategy.

3. Specific market opportunities and threats

This factor requires the strategy to be tailored to the organization's capabilities and threats coming from the external environment. The strategy should lead the organization to the realization of more opportunities, especially related to the acquisition and preservation of the competitive advantage. In order for the strategy to succeed, it must be coupled with the opportunities and threats of the external

environment. In order to achieve this, offensive measures should be developed to realize the most attractive opportunities on the market and defensive actions to protect the long - term competitive advantages of the company.

CONCLUSION

The tendencies for the development of the restaurant industry in Bulgaria are towards the expansion of the activity, the range and the services offered in the restaurants. It is clear that the consumer market is becoming more segmented and differentiated. The individualism of consumer tastes and preferences is rapidly developing. Such market segmentation and customer satisfaction requires managers to offer products and services that are specifically tailored to customer expectations.

Satisfying consumers' desires and attitudes when visiting restaurants is the foundation on which restaurants build their strategies. Increasing profits is possible through optimal customer choice, which means attracting and retaining those customers who –generate profit for the business. The aim is to allocate resources for marketing activities among the diverse customer base so the more resources, the most active marketing activities, to be directed to the customers who make the most profit. To achieve this, different strategies are needed that are based on the distinction between higher and lower

profit customers, as well as the distinction between higher and lower profit potential customers while allocating marketing resources to retain consumers, stimulate their loyalty and ensure their satisfaction.

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INNOVATIVE APPROACHES AND MODERN METHODS IN TRAINING TO IMPROVE THE QUALITY OF HEALTH CARE FOR DIABETES

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ABSTRACT

Despite current treatment options, Bulgarians with diabetes have poor glycemic control, which is a prerequisite for the development of disabling diabetic complications. To overcome this problem, we need:

- *a new type of health policy, focusing as a priority on medical and social prevention and prevention of its disease and complications, by providing access to information, health education, and health literacy.*
- *quality health care with an emphasis on health education and upbringing to increase patients' health and literacy.*
- *changes in the health care system that create conditions for disease control and prevention of its complications with the participation of a well-motivated self-control patient, with mutual trust and collaboration between the patient and the team being key factors for success.*
- *new approaches and methods in the training of healthcare professionals requiring new qualitative changes in medical education towards reforming the specific competencies and responsibilities of medical professionals for the organization and delivery of complex medical and social care with a view to minimizing the risks associated with diabetes.*

Training for both patients and healthcare professionals involved in the multidisciplinary healthcare team is a key factor. Training of healthcare professionals is needed in relation to the changing characteristics of their professional roles, functions and responsibilities, stemming from the priorities and trends of modern health policy.

Key words: *diabetes mellitus, multidisciplinary team, training, professional and social roles*

INTRODUCTION

Diabetes, along with cardiovascular and oncological diseases, is emerging as a leading medico-social pathology. The emerging medical, social, and economic problems of this category of people require, respectively, health, social and economic support from society. Quality diabetes care and the specific needs of patients with diabetes require the complexity and comprehensiveness of care and, first and foremost, a well-trained professional multidisciplinary team. The team needs to be tailored to the needs of the patients and, in order to meet the need for complexity and comprehensive care, it is right to be more diverse.

The healthcare system also needs to create conditions for disease control and prevention of its complications with the participation of a well-motivated, self-controlled patient. Self-control transforms people with diabetes and their relatives from passive observers of treatment into

active partners for its management and helps to achieve current and long-term therapeutic goals.

Mutual trust and collaboration between patient and team is key to success. A multidisciplinary diabetes team is one that should help people with diabetes make their informed lifestyle choices and by acquiring knowledge, behavioral skills and self-responsibility to exercise regular self-control. Training is a basic approach to increase personal motivation and responsibility for the self-monitoring and self-control of daily activities and behavior, with a view to improving the health status and quality of life of diabetics. Trends in world practice and positive experience that is advisable to implement and in our country is a team model of patient-centered care:

- with an emphasis on patient education: about the disease, dealing with the medico-social problems that arise in this regard, and regarding self-control, self-monitoring, self-control and self-care.

- new specialties, competencies, responsibilities established by law: podiatrists - doctors and nurses, clinical pharmacists, clinical social workers.

- expanding the team with: podiatrists, diabetic nurses, kinesitherapists, rehabilitators, ergo-therapists, social workers, psychologists, nutritionists, pharmacists and others.

- involvement of the patient organization, as a natural mediator between the health and social systems, mediator between the patient and society.

From the foregoing, the key factor is the training factor for both patients and members of the healthcare team. The priorities and trends of modern health policy require new qualitative changes in medical education towards reforming the specific competencies and responsibilities of medical professionals for organizing and providing comprehensive medical and social care in order to minimize the risks associated with diabetes. The challenges of the new public health are changing the characteristics of the professional roles, functions and responsibilities of healthcare professionals, and in particular of healthcare professionals. (2)

The reforms that have taken place in our health care system and the harmonization of regulations with European norms and standards also require new approaches and methods in the training of healthcare professionals. In keeping with the new health realities and needs, we should go beyond the narrow concept of "professional role" (the content of which only includes the set of functions and responsibilities of the healthcare professional concerned) and to use the concept of "social role", representing certain professional behavior based on normatively established standards (competences, rights, responsibilities) and defining the social position of health care providers and services, on the one hand, and social users' expectations and desires (individuals, groups, society). (2)

EXPOSURE

The medical and social analysis of diabetes mellitus with its complications and studies conducted in the 2014-2018 period for: the nature and specificity of health care for patients with diabetes mellitus; their organization in Bulgaria and in the district of Burgas - in hospital and outpatient care helped us to draw the following conclusions:

- need to raise patient awareness of: risk factors for health and development of health care, complications of health care, prevention of late complications.

- the need to educate patients on self-monitoring, self-control, self-care

- the need to approve innovative forms of patient education

- the need for continuing training and qualification of healthcare professionals to achieve better quality of care for patients with diabetes

In connection with the above, a team of professors and students at the University "Prof. Dr. A. Zlatarov" Burgas and mentors from the educational and practical base of the Regional Association for Non-Profit Use (RNC) "Diabetes Care" Burgas implemented a project on the topic: "Innovative approaches in the training and qualification of healthcare professionals for the prevention of diabetes and its leading complications."

The working team focused on the implementation of innovative pedagogical and medical - social approach" training of trainers "in the theoretical and practical training of healthcare professionals and teams of non-governmental patient organizations with the aim of improving the quality of care for people with diabetes, the disease and the prevention of its complications.

Aims, objectives and activities of the research team:

- Objectives:

1. Achieving better quality of professional health care for patients with health care through the formation of specialized knowledge, skills and approaches for the provision of complex medical and social care and services;

2. Training and qualification of health professionals to work in a team on diabetes and its leading complications, including their medico-social prevention.

- Tasks:

1. Improve the theoretical and practical training of healthcare professionals regarding the prevention of diabetes and its complications.

2. Formation of motivation and skills of healthcare professionals for communication and work in a multidisciplinary healthcare team for provision of medico-social care, prevention and psycho-social support of patients with health care and their families.

3. Establishment of multidisciplinary training teams between the training structure, health care professionals and professionals from the Diabe-

tes Care Center - Burgas for testing innovative methods and approaches.

4. Formation of specialized skills and approaches for trainees to provide complex medico-social, rehabilitation and prophylactic care and services for improving the quality of life for patients with diabetes.

5. Formation of health motivation and culture of patients with diabetes with physical support of healthy lifestyle, prevention and prevention of leading complications.

6. Formation of specialized skills for developing a package of practical guidelines and tools for awareness, monitoring, control and mutual assistance for patients and their environment for improving the quality of life.

• Activities:

✓ Development and testing of teaching and training tools for:

- training groups and individuals with a diabetic foot and a cardiovascular disease (CVD);

- fiches for self-monitoring and self-control of the motor, nutrition and hygiene regime;

- methodological guidelines for glucometry and biodesiometry;

- clinical algorithms;

- algorithms for healthcare professionals;

- development of information brochures for patients with diabetes

✓ Development of programs for early and late prevention of diabetic foot and CVD;

✓ Consultation and training of patients by the association;

✓ Jointly hold an information day on diabetes prevention and its leading complications;

✓ Preparation by students of different training programs;

✓ Surveys among patients and healthcare professionals.

Methods and forms of training used:

• Interactive methods and heuristic talks

• Lectures

• Multimedia presentations

• Information days

• Quizzes

• Practical Education

• Travel seminars

• Group mobile activities - hiking, gymnastics and more.

Results:

• Enriching, expanding and innovating the methodology of specialized theoretical and prac-

tical training for trainees and healthcare professionals;

• Formation of a research approach in trainees;

• Formation of motivation, knowledge, skills, qualities, abilities of the trainees for implementation of integrated medical and social care, prevention, rehabilitation and medico-social support of individuals and nosological groups.

Applicability:

• Development of a package of practical guidelines for patients and their environment in order to prevent and prevent diabetic complications.

• Improving patients' health awareness of the leading risk factors for the onset and spread of diabetes mellitus and its complications.

CONCLUSION

The cooperation between the research team of the teaching structure of the Faculty of Public Health and Health Care at the University "Prof. Dr. A. Zlatarov" and the non-governmental patient organization "Diabetes Care" for the implementation of modern approaches in the training of healthcare professionals and patients, achieves the following goals:

1. Achieving better quality of professional health care for patients with health care through the formation of specialized knowledge, skills and approaches for the provision of complex medical and social care and services;

2. Training and qualification of health professionals to work in a team on diabetes and its leading complications, including their medico-social prevention.

3. Increasing the health motivation and culture of patients with diabetes to ensure healthy lifestyles, prevention and prevention of leading complications

In conclusion, the following summary can be made: The innovative approaches and modern methods used in healthcare education contribute to the achievement of:

- to make fuller use of financial, logistical and human resources in our healthcare system;

- improving the efficiency and effectiveness of the activities, care and services provided in accordance with the health needs and expectations of individuals, nosological groups and communities.

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