

**Assen Zlatarov University**  
**Burgas, Bulgaria**



**ANNUAL**

**2**

**VOLUME I, BOOK 2, 2021**

**SOCIAL SCIENCES**



ASSEN ZLATAROV UNIVERSITY  
BURGAS, BULGARIA

ANNUAL

Vol. L, BOOK 2, 2021

SOCIAL SCIENCES



*Assen Zlatarov University*

Assen Zlatarov University  
Annual, Vol. L, BOOK 2, 2021  
Burgas 8010, Bulgaria  
ISSN 2603-3976

**ASSEN ZLATAROV UNIVERSITY  
BURGAS, BULGARIA**

**ANNUAL**

**Vol. L, BOOK 2, 2021**

**SOCIAL SCIENCES**



**BURGAS • 2021**

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## PLACE AND ROLE OF TOBACCO IN THE HISTORICAL FATE OF BULGARIA: CENTRAL HIGHLIGHTS

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### ABSTRACT

*For the last four centuries, tobacco has been an integral part of Bulgaria's historical fate and has hugely contributed to the foundation of the country's economic, social and cultural characteristics. Throughout this extended period, the development of tobacco as a livelihood, industry and public policy follows the amplitudes of economic and geopolitical changes. Until the third quarter of the 19th century, and Bulgaria still part of the Ottoman Empire, the selection of so-called oriental varieties of tobacco led to the formation of sustainable economic practices with an impact on social stratification. With the re-establishment of the Bulgarian State in 1878 began also the period of conscious national interest, which would turn the tobacco industry into a leading trading segment after the 1920s, and would later rank the country among the global leaders of tobacco production and trade.*

**Keywords:** Ottoman Empire, Bulgaria, oriental tobacco, markets, tobacco industry, tobacco monopoly

### INTRODUCTION

This article draws attention to the key moments in the history of tobacco in a comprehensive chronological context, from the plant's arrival on the Balkans to the position of the Bulgarian tobacco industry in the second half of the 20<sup>th</sup> century. The suggested periodization is conditional and applies only to the present study. It is based on general indicators, which have marked the role of tobacco during the various stages of its development. Further, the purpose of this study is to provide a structured representation of the overall impact of tobacco in Bulgaria's past. Based on prominent historical and expert studies, an emphasis is put on the place of tobacco production within the agricultural and social characteristics of Bulgaria during the period of Ottoman rule. Additionally, the article interrogates the official tobacco policy after the re-establishment of the Bulgarian state in 1878 and outlines the prerequisites for Bulgaria's transformation into one of the leading international figures of production and trade of oriental tobacco and tobacco products. The scientifically substantiated assessment of these research fields presumes the understanding that the growth, handling, trade and use of tobacco and tobacco products along with the knowledge that comes with it, constitute an essential part of the eco-

nomical and social characteristic of Bulgaria in historical and modern aspects. In certain regions of the country, this was main occupation for the population throughout centuries, dating back to the 17<sup>th</sup> century, during the times of the Ottoman Empire and continuing nowadays. Before becoming a significant feature in the Bulgarian culture, tobacco has come a long way full of hurdles.

According to current sources, tobacco played an important role for Native American Indians in their religious, social and healing practices [9, pp. 19-20; 49, pp. 16-19]. Jordan Goodman draws attention to the fact that particularly some Native American tribes considered tobacco a sacred plant with supernatural properties. In addition, the plant is present in a number of myths, which were an essential component of their cognitive worldview and philosophy of life [13, pp. 23-24]. It is necessary to emphasize that tobacco is often found together with some of many other plants that, due to the combination of their healing and hallucinogenic properties, have been used during religious and magical practices [42, pp. 69, 73, 79]. Apart from ritual and medical practices, when Europeans discovered tobacco, it was already an integral part of the formal ceremony and everyday life of American people, present in daily routines and professional activi-

ties, in family life and leisure time, as well as in social practices [11, p. 10].

One of the versions indicating the origin of tobacco's modern name goes back to the improvised cigars, which Native Americans called *tobaccos*. Another version brings the name of the island of Tobacco, where Europeans discovered tobacco for the first time [7, pp. 36-37]. Initially, the new plant was perceived in Europe as herbs, yet unknown, with a wide range of healing effects. According to James Grehan, this newly discovered panacea was believed to cure everything from colds to infections. Gradually, it became a popular habit in England, the Netherlands and Spain, and later across the whole continent [14, p. 1354].

The European tobacco journey began in Seville, Spain. Later on, the plant also spread across Portugal, France and Italy [29, p. 8]. By 1570, the plant was cultivated by a number of European countries such as Belgium, Spain, Switzerland and England among others [13, p. 36]. When considering the introduction of tobacco in Europe, it is important to take into account Eric Burns' statement that the spread of the plant did not follow the rhythm of influence from one European country to another, but rather it penetrated from America to individual European countries on different routes [11, p. 28]. It turned out that, less than 100 years after its discovery by Columbus, tobacco was grown on all continents and was undoubtedly present as an exchange product of trade between Europe and America. Additionally, tobacco played an important role in shaping the European understanding of the resource importance of the newly discovered lands (for the Old Continent) and the importance of their colonization [9, p. 20]. According to some researchers, the majority of English immigrants came to America because they were attracted to the opportunity to earn a living by working in the field of tobacco production and trade [27, p. 9; 9, p. 23].

The environment in some countries was in favour of tobacco's growth. In France in 1674, Jean-Baptiste Colbert preserved the right to produce and sell tobacco only for the state, thus practically introducing the first state monopoly over tobacco in Europe [7, p. 122]. In America, tobacco was so highly valued that it often replaced money as a basis or means of exchange of various goods and services. Public, county, and parish taxes in Virginia could be paid with tobacco. Subsequently, in 1640 a law was adopted to regulate tobacco payments [7, pp. 54-57]. The

role of tobacco in the American society and economy was growing. Particularly significant was the example of Maryland, as Gloria Main highlights, where the densifying of emigrants resulted in amplitudes in the production and costs of tobacco [27, p. 16].

In certain periods, various European countries required prohibition practices for the production, trade and use of tobacco, but bans could not interrupt the process of mass use among Europeans. For example, despite attempts by a number of English monarchs to impose a negative attitude towards the new plant, Allan Brandt draws attention to the fact that by 1670 half of the country's male population smoked daily [9, p. 21]. Germany, as well, attempted to restrict trade and use of tobacco. For example, the general ban on smoking in Bavaria from 1656 allowed only pharmacists to sell tobacco for medical purposes [32, p. 2]. However, the positive attitude towards the latter rapidly gained ground and led to tangible results in the manufacturing infrastructure of the country in the decades to follow. In 1788, H.H. Schlottmann built the first cigar factory in Europe in Hamburg [15, p. 5].

The prohibition practices in England and Germany suggest that, despite doubts regarding the relationship to tobacco, in most countries the new agricultural sector left its mark on the future development of the old continent and played a major role in the European colonization of the Americas.

## **TOBACCO IN BULGARIA DURING THE OTTOMAN PERIOD**

According to the majority of researchers, tobacco appeared in the Ottoman state at the end of the sixteenth, the beginning of the 17<sup>th</sup> century, although there are assumptions of its presence on the territory of the empire as early as the last quarter of the 16<sup>th</sup> century [24, p.16; 33, p. 4; 7, p. 103; 14, p. 1352; 41, p. 16; 30, pp. 6-7; 6, p. 13; 3, pp. 7-8; 5, p. 2; 36, p. 11; 28, p. 139]. Researchers arguing that tobacco appeared in the early 17<sup>th</sup> century take their lead from the earliest known evidence found in the writings of famous Ottoman writers Sheikh Ibrahim Likano and Ibrahim Pechevi, who claim, it was the year 1601. Nikos Svoronos acknowledges this dating, however he believes that actual tobacco cultivation and processing started around the middle of the 17<sup>th</sup> century [45, p. 262]. Initially, tobacco aroused interest among the medical community, both in Europe and within the Empire. Also,

information about the new plant appeared for the first time in medical literature, which was dated back to the end of the 16<sup>th</sup> century. According to James Grehan, the reason for this was the constant exchange of medical knowledge and experience within the Mediterranean world. Ottoman physicians, trusting the European insights into the exceptional healing properties of the new plant, widely recommended tobacco compresses as a relief against burns and bites and tobacco drinks as a remedy for various kinds of medical conditions [14, pp. 1354-1355].

Two centuries after the conquest by the Ottoman Empire, the Bulgarian territories have long been fully integrated into the economic, commercial and administrative system of the Empire. It is supposed that seamen from different countries brought tobacco into the ports of the Aegean and Marmara Sea. There are differing opinions regarding the permeation of tobacco in the Ottoman Empire, with part of the research linking it to the activities of English traders, as Ekrem Ishin outlines [17, p. 65], while others have suggested that this happened through Italy. Mary Neuburger comments the disputes by considering the two main points in historiography [33, p. 4]. In addition, François Pouqueville, whose statement however was based on no reliable sources, points out as early as 1826 that, during the reign of King Henry du Valois (1574 – 1589), French traders brought tobacco into the territory of the Ottoman Empire [37, p. 272]. An additional group of researchers has put its focus on the Arab-Persian connection. The reasons for such a conclusion are not only historical but also linguistic. Alexander Matkovski emphasizes the Persian origin of the terms associated with the *new* product, which were adopted in the Ottoman Empire, including on the Balkans. The fact that the term ‘tobacco’ was used not only on the territories of the Ottoman Empire is in support of the above assumption [28, pp. 140-143].

In the late 17<sup>th</sup> century, tobacco was cultivated in the Balkans and gradually penetrated into the Bulgarian ethnic spaces, along the valleys of Vardar, Struma, Mesta, Maritsa and Arda rivers [41, p. 24; 50, p. 105]. In 1611, tobacco was mentioned for the first time in an official Ottoman document, whereby Sultan Ahmed I forbade the sale and use of tobacco [14, p. 1362]. This fact gives ground to potentially consider that tobacco might have permeated at an earlier stage on the Balkans – also because it would have needed a relatively long presence for it to become adequately popular and to be perceived by

the authorities as a threat, which would have led to its ban. Sultan Ahmed I’s decision displays that, similar to a number of European countries, tobacco in the Ottoman Empire faced numerous obstacles in the early days of its dissemination, caused by infrequent destructive campaigns by political and religious groups. The ban on use, trade and cultivation of tobacco was a subject of a special regulation from 1622 made by Sultan Osman II and sent to representatives of the Empire’s judicial institutions. It is clear from the text of the decree that previous bans in this direction have not given the desired results, which has necessitated the emergence of the latter. The new order strictly forbade planting, growing, collecting tobacco as well as demanded ‘not to sell and buy in shops and markets and no one to smoke tobacco in cafes, homes, in various places where people gather or elsewhere’ [28, p. 169]. The next serious attempt to take action against the use of tobacco was during Sultan Murad IV’s ruling period (1623 – 1640), which was also in support of the reformist Islamist movement of Mehmed Effendi Kadizade. In addition to bans on tobacco sales and café closures, smoking was defined as an offence punishable by death. The Sultan himself personally participated in this campaign [24, pp. 62-63; 14, pp. 1362-1363; 41, p. 17; 10, p. 75; 28, pp. 150, 169, 172]. Despite the Sultan’s restrictions, around the middle of the century, the use of tobacco was already widespread among various sections of the population [17, p. 65]. The Sublime Porte had already changed its policy: it no longer opposed its use and in 1687, just like other countries, it introduced a tax by means of which tobacco consumption and production was officially allowed [34, p. 26; 30, p. 7; 50, p. 105].<sup>1</sup>

Once accepted within the territories of the Ottoman Empire, tobacco found favourable natural, agrarian and social conditions for development. Gradually, the so-called oriental varieties of tobacco were selected and recognized. They became world-famous throughout the following centuries and were highly demanded by cigarette companies from all continents. As Jacques Aseov summarizes, the reason for this lies in the fact that oriental tobacco sorts contain the most minimal amount of nicotine, having a specific and

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<sup>1</sup> The Turkish name *tyutyun* (tobacco) was gradually introduced in the Ottoman Empire, which was also accepted in the languages of the subjugated nations, including Bulgarian language. See: Laufer, Introduction of Tobacco into Europe, p. 60.

pleasant aroma while their leaves are highly elastic and not so fragile [2, p. 121]. In the beginning, tobacco in the Ottoman Empire, including on Bulgarian lands, was only used for internal needs but gradually, with the expansion of production and development of the sorts, the export of tobacco began. The major centres of tobacco production and trading became cities such as Thessaloniki, Plovdiv, Kavala, Nevrokop, Petrich, Sveti Vrach, Gorna Dzhumaya, Dupnitsa, Haskovo, Kardzhali, the region of Dzhebel, Samsun and Izmir in Asia Minor and others. These districts were economic and administrative centres with diverse ethnical composition. Mostly in the mountain regions with well-developed stock farming, they faced agricultural limitations, such as insufficient land space and low soil fertility. On the other hand, the chemical and physical composition of the soil and the climatic conditions were perfectly suitable for oriental tobacco. For a number of experts and scholars such as Karl Müller and Georgi Kremenski, combined with the social characteristic of the population, its labour habits and economic traditions, these factors were pivotal for the manufacturing infrastructure of the specified regions, giving tobacco very high priority [30, pp. 6-7; 6, pp. 50-68; 2, pp. 79-120; 33, pp. 10-36; 3, pp. 115-153; 36, pp. 46-50; 33, pp. 4, 44]. In the initial period of its growth on the Balkans, sources indicate that tobacco was primary occupation of the Muslim population – not only did they grow it, but they were also its main consumers. In the course of time, tobacco growing became a main economic source of income as the population (Muslims and other ethnic groups) developed specific skills needed to grow, produce and handle tobacco. This resulted in the forming of a specialized category of tobacco growers who passed down their knowledge and experience to their family, maintaining family business traditions, as there was an abundance of skilled manpower resources constantly engaged in producing more and more tobacco [18, p. 62].

Commercially, it was the Turkish, Greek, Jewish, and Armenian traders who established positions on the market. Gradually, however, tobacco began to be as well perceived as a source of occupation by the Bulgarians, who consequently developed trading relations. The names of six Bulgarian tobacco traders from Melnik and Veliko Tarnovo were mentioned for the first time in trade registers from Transylvania, stating that they have exported 43 tons of tobacco throughout the period 1673 – 1692 [34, p. 26]. The de-

velopment of tobacco trading went beyond the boundaries of the empire, engaging an ever-growing number of partakers thus expanding the financial and economic spectrum of the Ottoman foreign trade. That is why, at the end of the 17<sup>th</sup> century, the Sublime Porte introduced customs duties on the export of tobacco [50, p. 105]. In the coming centuries, tobacco gained increasing popularity as a product, as a commodity, and as a practice. With the advent of the cigarette industry, it gave even more impetus to the tobacco industry worldwide [9, p. 19].

Throughout the following hundreds of years, tobacco's popularity as a production item, trading good and habit grew more and more. In the 19<sup>th</sup> century, entire families were involved in tobacco production. Bulgarians from Constantinople, Plovdiv, Gorna Dzhumaya, Nevrokop, Dupnitsa and other towns began to play an increasingly important part in the development of tobacco trading. One of the first production and trading brands in Bulgaria, Tomasyan and Co., which was recognized both nationally and internationally, was linked to the tobacco factory founded in 1872 in Plovdiv [43, pp. 225-231].

Over time, revenues from tobacco production, trade and consumption became a prime budget stake (strongly guarded by the authorities) of the Ottoman Empire. The conscious ambition to preserve the regions in which tobacco production was main livelihood during the period of the Empire's collapse became quite evident. Therefore, after 1878, while Thrace and Macedonia remained Ottoman shires, the political and armed conflict that would erupt in the upcoming decades between the Ottoman Empire and the Balkan liberation movements, was as well a battle about the agricultural conditions of those regions, among which tobacco played a major role.

#### **DEVELOPMENT OF BULGARIAN TOBACCO INDUSTRY FROM 1878 – 1912**

From Bulgaria's liberation in 1878 to 1900, tobacco production spread gradually, mainly for local consumption. The regions where tobacco was grown were in the vicinities of Kyustendil, Dupnitsa, Deliorman, and after 1885, Plovdiv and Haskovo [6, p. 256; 19, pp. 30-34]. At that time, smoking was not really present in the everyday life of Bulgarians. Statistical data from 1881 indicates that 400,000 units of weight of tobacco were produced in the Principality of Bulgaria and as those quantities could not satisfy the domestic needs, an additional amount of

160,000 units of weight was imported [50, p. 106]. While we indicate these statistics and regard the development of tobacco during the first years of the Bulgarian Principality, we must stress that the implementation of tobacco as agricultural and financial priority emerged quite difficult and was, in fact, a result of decades of acquiring knowledge, experience and complying with international political and trade tendencies, as well as pragmatically assessing Bulgaria's natural resources and considering characteristic production and family traditions in different regions of the country [19, p. 30]. During this period, the tobacco sector was considered a guaranteed income for the treasury, regardless of the fact that local consumption was not yet mass consumption. That predetermined the nature of legislation initiatives in that direction. Frequent alterations in the legal and statutory framework on tobacco were witnessed, which demonstrated both the absence of a steady social and business policy by the state in that field and the deficit existing in the state understanding of the strategic importance of tobacco for the future development of the Bulgarian economy and society in general [19, p. 33; 20, p. 121; 21, pp. 100-101;].<sup>2</sup> The opinion of well-known politician Grigor Nachovich was an exception to that statement concerning the role of tobacco in the country'

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<sup>2</sup> Frequent changes in the legal framework of the Bulgarian tobacco industry during this period can be found in the following legislative initiatives: Provisional regulations on the excise tax on tobacco in the Bulgarian Principality, 1879, Skoro-pechatnitsa Yanko S. Kovachev, Sofia, Bulgaria; Banderole tariffs on ready-made tobacco products, i.e. smoking tobacco, sniffing, cigarettes in the Bulgarian Principality, 1879, Skoro-pechatnitsa Yanko S. Kovachev, Sofia, Bulgaria; Instructions for implementation of provisional regulations for the excise of tobacco in the Bulgaria Principality, 1879, Skoro-pechatnitsa Yanko S. Kovachev, Sofia, Bulgaria; The supplement to the provisional regulations on tobacco excise is promulgated here: Penalties issued by the Nicolaidos are published here and adapted to the Tobacco Statutes, 1879, No. 4, Darzhaven Vestnik, Sofia, Bulgaria; Proposal for some amendments to the provisional regulations on tobacco excise, approved by the Supreme Decree from 21 December 1879 published in Godishen Zbornik ot Zakoni na Bulgarskoto Knyazhestvo, prieti ot II Obiknovenno Narodno Sabranie, 1886, 211-12; Darzhavna Pechatnitsa, Sofia, Bulgaria; Regulations on rights and obligations of inspectors at tobacco factories, 1884, Izdanie na Ministerstvo na Finansite, Sofia, Bulgaria.

development, as he insisted that Bulgaria should produce the tobacco imported from the Ottoman Empire independently. In 1883, in his capacity as Minister of Finance, he published a brief article entitled 'The Tobacco Industry in the Bulgarian Principality' where he made the first profound business, fiscal, legal and political analysis of the situation of tobacco production in Bulgaria and the Ottoman Empire. Here, Nachovich demonstrated the strong view in the necessity for Bulgaria to develop tobacco business extensively. He was also the first to turn tobacco production into government strategy. His words that tobacco 'could become a significant source of wellbeing for the population (...) and be useful for the country', were proved right during the next hundred years, when Bulgaria gained its position as one of the global powers in tobacco business [31, p. 15].

Regardless of the ambiguous attitude towards tobacco, its development continued and the business parameters increased essentially. In 1901, there were already 77 factories in the country for tobacco cutting and packing with almost 4,000 workers and production had grown more than 16 times, reaching 2,534 tons [50, pp. 106-107]. Naturally, these positive results were not sufficient to seriously approach the recommendations of Grigor Nachovich and tobacco production still wasn't government priority. That was the reason why the suggestion made by the Bulgarian Prime Minister Petko Karavelov to the Parliament in 1901 to pass a law for establishing a state tobacco monopoly, was revoked, similarly to many other European countries [33, pp. 53, 64-68; 50, pp. 88, 108].<sup>3</sup>

The tobacco industry in the country was closely related not only to national and regional business and political specifics, but was also subject to the common pace, standards and trends in the international development of tobacco manufacturing. In 1905, the first cigarette-making machines were imported to Bulgaria. Up

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<sup>3</sup> Documents about the tobacco monopoly can be found in the following sources: Tobacco monopoly according to the research of Prof. I. Janzhul, 1901, Pechatnitsa G.A. Nozharov, Sofia, Bulgaria; Tobacco monopoly or tobacco's banderole system. Reports presented at the 22nd regular meeting of Sofia Chamber of Commerce and Industry, 1914, Pechatnitsa P. Glushkov, Sofia, Bulgaria; Tobacco's regime in New and Old Bulgaria. Reports presented at the 7<sup>th</sup> regular annual meeting of the Burgas Chamber of Commerce and Industry, 1914, Pechatnitsa N.V. Velchev, Burgas, Bulgaria.

to that time, cigarettes were made by hand and a worker typically made between 1 and 3 kg of cigarettes a day. With the new technologies, a worker was able to make 400 kg of cigarettes a day. Two years later, in 1907, in Bulgaria there were already 54 technology-equipped factories for production of cigarettes [50, p. 108]. Mary Neuburger and Dimitar Yadev highlight the fact that the expansion of tobacco production and the development of the cigarette-making industry preconditioned the formation of expressed corporate interest in this field and in 1911 the cartel of United Tobacco Factories in Bulgaria was established [1, p. 300; 50, p. 88; 33, pp. 53, 67-68].

Because tobacco industry in the Ottoman Empire enjoyed a long tradition, including enormous export to Austria-Hungary, Germany, Russia, Egypt and America, oriental tobacco sorts were mostly known as Turkish export. In this regard, the export of Bulgarian tobacco initially took place under a Turkish label. As early as the 19<sup>th</sup> century, some American cigarette manufacturers began to emphasize oriental tobacco as an ingredient in their cigarette brands [9, p. 26; 44, p.19]. We should not forget the fact that at the beginning of the 20<sup>th</sup> century, the Ottoman Empire continued to be the largest manufacturer of tobacco in Europe. The first shipments of Bulgarian oriental tobacco sorts were exported under a Turkish label by businessmen from Kavala and Thessaloniki in 1891 and they were designated for export to Egypt [50, p. 107]. In 1910, tobacco production reached 6,281 tons with domestic consumption of 2,000 tons, meaning that production share for export had significantly increased. The export took place through renowned European and American companies such as Commercial, Herzog, American Tobacco, Reynolds, etc.[5, p. 3; 33, p. 58; 50, p. 107; ] Thus, from 381 tons in 1891, Bulgaria already exported 3,524 tons in 1911. Gradually, the country not only became manufacturer of oriental tobacco, it also played a significant role in tobacco trading worldwide regardless the fact that tobacco share in Bulgarian exports as in the decade prior to the Balkan Wars of 1912 – 1913 was quite modest, only 1.6% [50, p. 107].

In order to summarize our evaluation on the development of tobacco in Bulgaria throughout the period 1878 – 1912, we should definitively emphasize that during that period the social and agrarian perimeter of the tobacco industry considerably expanded and the volume of production grew. The foundations of the legislative and regulatory framework of tobacco industry in Bulgar-

ia were laid and the country was recognised not only as one of the major manufacturers of oriental tobacco, but also acknowledged as an exporter of tobacco products. It is important to stress that the cigarette industry experienced steady modernisation and the consumption of tobacco products grew significantly.

### **BULGARIAN TOBACCO DURING THE MILITARY CONFLICTS AND GLOBAL CONTRADICTIONS OF 20<sup>TH</sup> CENTURY**

The real boom in the development of tobacco industry in Bulgaria was, however, yet to come and, strange as it may seem, the reason for that were the wars during the period 1912 – 1922. Immediately after the Balkan Wars, the Ottoman Empire lost its European territories, which were divided among Greece, Bulgaria and Serbia [36, p. 55]. Bulgaria gave its corn field Dobrudzha to Romania but acquired the territories located between the rivers Mesta and Maritsa, along with Pirin Macedonia and the towns of Gorna Dzhumaya, Nevrokop, Razlog, Sveti Vrach, Petrich and Strumitsa [12, pp. 401-417]. Those regions were renowned tobacco producing centres and their population was well-acquainted with tobacco growing and handling as it was an integral part of their everyday lives and cultural characteristics. An essential rise of tobacco production in Bulgaria took place, which ranked the country among the nations known for export of oriental tobacco sorts. Another consequence of the wars was that a substantial portion of refugees from Macedonia and Thrace were skilled tobacco growers. The refugees were diverted to and settled down in and around main Bulgarian towns – this new situation altered Bulgaria's social and economic characteristics [3, p. 10; 36, pp. 51, 56; 50, p. 109]. In this way, the Bulgarian government acquired new skilled tobacco growers and workers. Before the outbreak of World War I, tremendous quantities of tobacco were exported under a Bulgarian and not a Turkish label to Austria-Hungary, Germany, Italy, even to America [6, p. 274, 50, p. 271]. After 1912, along with already established importers of tobacco such as China, Russia, Japan, Greece and Turkey, Bulgaria regularly exported large quantities to the huge Egyptian market [41, p. 75].

In 1915, Bulgaria entered World War I. Germany was cut out from its colonies and from America, who supplied the country with tobacco. Along with Austria-Hungary, Germany began to source tobacco import solely from Bulgaria and

Turkey [36, p. 139]. With the opening of the large German market, oriental tobacco became first-priority for the Bulgarian foreign trade. During 1916 – 1918, Germany and Austria-Hungary acquired almost 100% of the exported Bulgarian tobacco. Compared to the percentage level of export in 1911, Bulgarian export to Austrian and German markets in 1918 increased by 116% and reached 186% after the war [23, p. 346]. Meanwhile, many foreign tobacco companies moved their headquarters from Thrace and Macedonia to Bulgaria. The following Greek-Turkish War in 1921 – 1922 formed an ever more favourable situation for the production and trading with Bulgarian tobacco. Due to the military activities in both countries, Greece and Turkey were not able to supply the world market with oriental tobacco sorts [6, p. 274; 33, p. 114; 36, pp. 52-53; 50, p.110]. Bulgaria remained practically sole exporter and for a short period of time tobacco production and trading with tobacco and tobacco products reached peak levels in the country. Except of the region of Vidin, the entire country began to grow tobacco. Due to the incomes from tobacco production and trade, Bulgaria overcame the post-war economic and financial crisis and managed to fill up the national treasury with a large volume of foreign payments. This rise in tobacco production was also known as the period of the ‘Bulgarian phenomenon’. To illustrate the above-mentioned evaluation, the following official data for the period should give a better understanding: in 1913, 5,044 tons of tobacco was produced, in 1918 – 22,344 tons and in 1923 – 53,955 tons [50, p. 108].<sup>4</sup> The export of 3,500 tons prior to the wars increased to almost 30,000 tons at the end of the period. For ten years, the increase was almost ten times. This was the first case known in worldwide practice, where a country demonstrated such a peak in production and export, especially during wartime [50, p. 108]. Those were ‘the golden years’ for the trade with Bulgarian oriental tobacco. Its share in the country exports of 1.6% before the war reached more over 40% after World War I. The definition that tobacco is ‘Bulgaria’s gold’ stated by the economist Alfred Behar is from that period. Eduard Fernandez,

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<sup>4</sup> According to Dimitar Yadev, the statistics we present here coincide with ones indicated by Ivan Pitekov, with the data for 1923, where Pitekov notes the number 52,200. See: Pitekov, *Tyutyunevata Istoria na Bulgaria*, 52-3. This discrepancy does not the general statement given in the text.

another economist, emphasized that ‘Thank(s) to tobacco, Bulgaria was the only country among all losing countries that succeeded without foreign aid, to initially preserve and later on, stabilize its lev currency’ [50, p. 111].

After World War I, Bulgaria was ultimately integrated into the international business and financial operations with tobacco and tobacco products and was recognized as one of the key players in the production of and trading with oriental tobaccos. That proved to be favourable for the national economy but at the same time the tobacco industry was more and more influenced by external factors and in the following years tobacco production and trading followed the amplitudes of international economic trends and parameters. There were periods of rise and periods of crises but production did not fall below 22,000 tons a year. Foreign companies began to gradually settle in the country and became direct buyers of Bulgarian tobacco without using the intermediation of Bulgarian traders. After 1927, up to 80% of the quantities of tobacco manufactured in Bulgaria were traded outside the country by four foreign companies, namely the German corporation Reemtsma and the Reggies of Austria, Italy and Hungary [2, p. 233]. Following that, about 150 Bulgarian tobacco business companies were forced to discontinue their business activity [50, p. 113].

On a global scale, Bulgaria became a permanent actor in the battle for the markets of oriental tobaccos. We should note that attempts were made to regulate the production and exports of oriental tobacco through a mutual agreement by the three major manufacturers, Turkey, Greece and Bulgaria. For that purpose, in 1932 a special conference was held in Istanbul, but it did not accomplish the desired results. The market and the competition remained the major factors forming the tendencies in the production of and trading with oriental sorts of tobacco. Steady balance was gradually established, which lasted until World War II. Greece held 43%, Turkey, 31%, and Bulgaria held 26% share at the worldwide market of oriental tobacco sorts [50, p. 113].

During World War II, Bulgaria once again increased its presence as a main player on the market of oriental tobacco sorts and reached the levels of previous post-war times. According to the treaty of 10 December 1940 between the Minister of Trade Slavcho Zagorov and Reemtsma, Germany started purchasing 34,000 tons of tobacco from Bulgaria, which practically formed a monopoly right over the export of tobacco from

the country, as the share of quantities exported to Germany reached almost 100% of the Bulgarian oriental tobacco export [50, pp. 113-114]. The final trade and economy liaison between Bulgaria and the Third Reich guaranteed a market for the Bulgarian production although under conditions this was not so favourable for the country. As Ivan Pitekov argues, the great disadvantage of that liaison was that it led number of West European, American and Arabic companies and businessmen to distance and leave the Bulgarian tobacco market [36, p. 155; 50, p. 114]. A deficit of trust and security in regard to the stability of the Bulgarian tobacco policy was thus established and the negative consequences of those processes were to be felt tangibly after World War II, when a major part of entrepreneurs, specialists and experts left the country for political, economic or personal reasons [36, p. 155]. Their concerns in relation to the unfavourable conditions for private businesses in the country were soon proved. In 1947, a state monopoly was established in the Republic of Bulgaria, leading to expropriation of the production and trading with tobacco and tobacco products from private businesses and turning it into state policy [50, p. 90].<sup>5</sup> A number of traditional markets were lost and exports in the 1950s witnessed a crisis by not exceeding 33,000 – 34,000 tons a year [50, p. 100].

In the course of time, the legislative, organisational and economic characteristics of tobacco and cigarette branches were established under the conditions of the so-called socialist planned economy. Regardless of all reserves related to planned economy, tobacco and cigarette production enjoyed exclusive success, mainly due to the gaining of positions on the tobacco market in the USSR and the states within the COMECON. Thus, Bulgaria demonstrated flexibility and succeeded in developing its tobacco production and trading potential in the period of the Cold War. Even under the new geopolitical circumstances in the first years after the Second World War, tobacco remained main export item for Bulgaria [23, p. 544]. According to statistic data comprehensively commented by Koycho Belchev, from 1948, when the first 30,914 tons of tobacco were exported to the USSR, up to 1989, the annual export to Moscow was almost always between 30,000 and 40,000 tons constituting more than

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<sup>5</sup> The Law on the state tobacco monopoly was promulgated in Darzhaven vestnik, No. 96 on 28 April 1947.

80% of the overall exports [5, pp.19-21]. The volume of cigarettes exported to the Soviet Union and the COMECON states was also continuously growing and from 1974 it was steadily above 50,000 tons [5, p. 23]. At that time, the state enterprise Bulgartabac was established. It monopolized the production of cigarettes and the trade with tobacco and tobacco products. In 1981, Bulgaria was already exporting more than 66,000 tons of tobacco annually and Bulgartabac ranked 6<sup>th</sup> – 8<sup>th</sup> by tobacco production in the world after China, the USA, Brazil, India and Turkey. The country ranked globally between 9<sup>th</sup> and 12<sup>th</sup> by cigarette production. At the same time, considering the fact that the total range of land used for tobacco growing reached up to 50 million hectares globally, 1 million hectares of tobacco was grown in Bulgaria. Consequently, Bulgaria ranked first worldwide in terms of tobacco production and export of tobacco and tobacco products per capita [19, pp. 66, 87]. State monopoly in Bulgaria continued until 1993, when a number of alterations in the tobacco legislation were undertaken in order to meet new trends in the agricultural and political developments taking place after the fall of the Communism in 1989.<sup>6</sup>

## CONCLUSIONS

The historical overview and analysis of the development and position of tobacco in the Bulgarian economy and society provides grounds for the conclusion that the development of tobacco industry in Bulgaria can be defined in few historical periods. Between the seventeenth and the 19<sup>th</sup> century, adapting tobacco to the Balkan climatic conditions and natural resources, selecting the so-called oriental tobacco sorts and turning tobacco into an important production and financial instrument in the period of the Ottoman Empire, led to the formation of durable production and everyday life skills and routines in tobacco growing and handling among significant parts of the population in Macedonia and Thrace. Numerous districts were permanently established as tobacco production centres, which had a favourable impact on the general economic infrastruc-

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<sup>6</sup> The state tobacco monopoly was repealed by Paragraph No 4 of the Transitional and Final Provisions of the Law on Amendments to the Law on tobacco and tobacco related products and was promulgated in Darzhaven Vestnik, No. 101, 30 November 1993.



ture of certain areas. Although tobacco was originally grown and consumed mainly by the Muslim population, over time it became an agricultural occupation and a hallmark of everyday life for all religious groups. The development of tobacco trade exceeded the borders of the Empire and engaged an increasing number of associates. Despite the dominance of Turkish, Jewish, Greek and Armenian merchants, along large producers, also small tobacco traders began to emerge among the Bulgarians. Consequently, even before the fall of the Ottoman Empire, tobacco played main role in shaping the image of the Bulgarian manufacturer and merchant abroad.

Following 1878, Bulgarian tobacco marked the beginning of a new period. Regardless of the political ups and downs, legislation changes or economic experiments in the development of the Bulgarian state, the production of and trading with tobacco and tobacco products were among the main features of business, social and cultural characteristic of Bulgarians. Tobacco widened up its perimeters not only within the agricultural, but also within the production infrastructure of the country, which led to significant production capacities. Also, the modern foundation stone for the Bulgarian tobacco industry was laid. The social effects of these transformations led to increase in the consumption of tobacco products. Furthermore, the period till 1912 was a time of building up the legal and statutory basis and of laying the foundations of the Bulgarian tobacco industry's infrastructure, of establishing the cartel of United Tobacco Factories and of making the first attempts to enter the international market with the help of Turkish and Greek companies and globally established European and American corporations. Bulgaria was not only a producer of oriental tobacco anymore, but was also a global market participant, even with a quite modest presence at this point.

The 1920s marked a turning point and the start of the third period in the development of tobacco industry, which lasted nearly till the end of the century. Further, in the last five decades, tobacco industry was entirely state monopolized. The Balkan Wars, World War I and the war between Greece and Turkey not only changed the state and territory map in South-Eastern Europe, but also created a new economic situation, whereby the tobacco industry managed to take maximum advantage of the opportunities established in order to ultimately turn into a strategic branch for the Bulgarian economy and state. The growing tobacco production permanently estab-

lished the country as a global exporter of oriental tobacco, while carrying out trade under Bulgarian trademark. Tobacco became a primary factor in resolving agricultural and financial crisis as well as in shaping domestic and foreign politics during the interwar period. The tobacco industry significantly dictated the agenda of the Bulgarian state and helped it form a specific model of geopolitical and economical adaptability. This phenomenon would also be seen in the decades that followed when, under the conditions of global military and political confrontations of the years after World War II and the Cold War, tobacco played more and more an important part as a successful instrument of the economic and social policy of Bulgarian governments and their international ventures.

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## THREE LITTLE KNOWN CHURCHES OF CONSTANTINOPE

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### ABSTRACT

*The presentation of the latest archeological evidence, new information, and the collecting of existing material related to Byzantine architecture monuments in Istanbul is an important step towards the better understanding of their nature and facilitating their analysis that is directly related to Byzantine culture as a model and archetype with its central place in the cultural environment of the whole Middle Ages. Such architectural monuments are the temples of Constantinople „St. Acacius“, „Sts. Carpus and Papyrus“ and „St. Mocius“. Their individual examination and analysis support their further presentation to the scientific community as a single image which would assist the future additional analysis and filling in of missing information concerning their architecture, structure and location.*

**Key words:** identification, analysis, churches, capital, Constantinople, architecture, history.

### INTRODUCTION

Throughout the centuries of its existence, the capital of the Eastern Roman Empire Constantinople accumulated, upgraded and collected in itself millennium-old monuments of culture that, irrespective of the end of the Byzantine state in 1453, continue to reveal their secrets.

Founded by Emperor Constantine I (306-337) and named after him, Constantinople (fig. 1.) is the last Roman city constructed according to the Ancient model with its typical features. The heirs to the Byzantine throne enriched the capital by erecting a lot of impressive architectural monuments, buildings and churches typical of



**Fig. 1** Plan of Constantinople. Autor: R. Botev

the Byzantine culture with their splendour, elegance, technical innovations, in a mix of what was best in the existing ancient cultural patterns. The capital was the largest and richest city in the greater part of the Middle Ages – it was called “the Queen of cities” even by its contemporaries. It was the centre of the known world.

Historians argue as to when exactly did the shift of the capital occur. Theophanes [1] mentioned that the modification and expansion of Byzantium began in the second year of the rule of Constantine, i.e., the year 316. According to Kedrin [2], the city was finished in the twentieth year of the emperor’s rule, on 11 May 330. The same author mentioned that Constantine died ten years after the city was founded. Nikephoros Kallistos [3] claimed, without specifying his source, that the constructions in the city started in 317 and ended in 330. Whatever year we accept to be the correct one, Constantine, during his whole rule, never ceased to expand and enrich the city, „without leaving its original limits“ – as Themistius [4] tells us. Constantine expanded the limits of the ancient city and erected new fortifications, administrative buildings, and churches. This was the beginning of a whole new era.

Expanded and decorated in this manner in a period of many centuries and inherited by emperors each of which aimed to outdo their predecessor, it is no wonder that Constantinople grew as the most beautiful city of the world, a

position it managed to keep in spite of the earthquakes and fires, until the last days of the Empire in 1453, a whole 11 centuries after it was founded.

Many monuments from the Byzantine Era have reached us, some of which, however, are not sufficiently popular and therefore have not yet been studied. This work will be dedicated to some little-known churches and we will bring to the reader's attention evidence concerning them and the interpretation of these findings.

### 1. The Church of St. Acacius

The place where the soldier St. Acacius became a martyr for Christian faith is disputed. A Syrian prayer-book that has come to us with a manuscript of the year 411 probably translated from a Greek original claims that this happened in Nicomedia [5]. In contrast to that, the martyrology of St. Jerome [6] that was probably written in Northern Italy between 431-51 states that this happened in Constantinople. The second statement is more probable as it is supported with additional arguments from the Church history of Socrates. It proves the existence of an early church name „St. Acacius“ in Constantinople. The commonly accepted version nowadays is that St. Acacius suffered martyrdom in Constantinople. The separate fragments of “the Greek saint's lives” [7] also locate his martyrdom and burial within Constantinople [8]. Socrates Scholasticus [9] claims that Macedonius of Constantinople (341-60) moved the body of Constantine I into the church where the body of St. Acacius had been placed in 359 as the conditions in the church of St. Apostles were still not suitable at that time [10]. It is important to mention that this by itself does not prove the existence of a church named „St. Acacius“ in Constantinople in 359. Most probably, the bishop moved the emperor's body there because this was the closest suitable church. For a second time in his work, Socrates Scholasticus mentioned a chapel dedicated to St. Acacius but it is not quite clear whether he had in mind the same building or another one. According to him, Emperor Arcadius (395-408) visited this chapel once that was build next to the walnut tree from which Acacius had been hung [11]. The presence of the emperor attracted a large mob of idlers from the building in whose open porch the walnut tree was. When, at the same time, it collapsed, nobody was hurt and there were no victims. This history, however, does not confirm

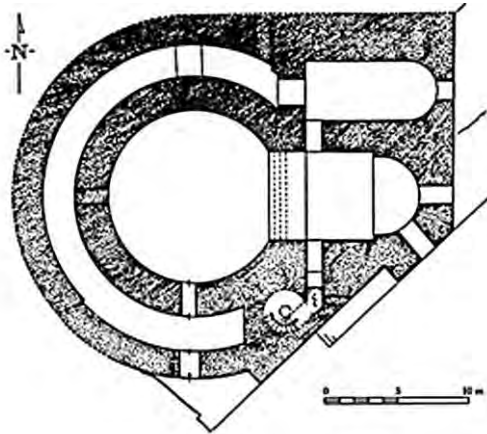
the existence of a chapel dedicated to St. Acacius during the above incident either, but rather at the time of that Socrates related the story. The discovery, however, of two unpublished sermons of John Chrysostom (398-404) that he delivered in the church „St. Acacius“ throw additional light on and are an evidence that there existed such a cult to this saint in the capital of the empire around 400 AD. It is possible that previous evidence we mentioned from Socrates Scholasticus mistaken the name of the saint with the one who could have built the church itself – some Acacius, a confidant of Emperor Constantine mentioned by Eusebius Pamphili. Thus, the church of Acacius built by him may have been printed in people's memory as the church of St. Acacius. There are such examples and names in other cities, too. The difference is there is a saint with this name and probably there was a church dedicated to him in Constantinople. According to Socrates, the saint's body was placed in the church of „St. Acacius“ next to a place called Stavrion. Its location has not yet been found with certainty but it is located within the city, near the walls of Constantine and the Golden Horn [12]. The probability that the saint's relics were moved from Nicomedia after the great earthquake there in 358 that killed the local bishop Cekropius should not be ruled out. This happened just at the time when the emperors sought ways to enrich the capital city with saints' relics. An example of this is the moving of the relics of St. Luke and Andrew in 359.

It can be summarized, in conclusion, that the church of St. Acacius in Constantinople was initially known as the church of Acacius by the name of its creator – one of the highest-ranking confidants of Emperor Constantine. It was only much later that it was related to St. Acacius of Nicomedia. The transformation of the name in fact was completed by the year 400. Such examples of the same confusion in people's memory exist also around the name of the church of St. Paul in Constantinople. It was named after bishop Paul of Constantinople (342-50) and it has housed his relics since 381. Sozomenos, however, stated that at his time somewhere around the year 440, a lot of people believed that the church bears the name of Paul the Apostle and houses his relics [13]. It was thus that the Syrian prayer-book and the martyrology of Jerome [14] do not contradict a lot in the presentation of the information about the transformation of the cult of St. Acacius and its

appropriation by Constantinople at the expense of its rival town of Nicomedia [15].

## 2. “Sts. Carpus and Papyrus”

The church „Sts. Carpus and Papyrus“ (fig. 2) was built at the end of IV or the beginning of V century when it was still outside the fortified walls of Constantine.



**Fig. 2** Plan and reconstruction of Sts. Carpus and Papyrus. *According to A. Schneider.*

It was studied for the first time in 1935 by Alfons Maria Schneider [16]. It is a rotunda with an internal circle of columns that support a dome. It is on the main street “Mesi” that leads to the Golden Gate, not far from the fortified walls overlooking the sea. It is known that St. Elena – the mother of Constantine I, ordered the construction of a martyrium dedicated to Sts. Carpus and Papyrus.

Later on, another church was constructed at its place – St. Polycarpus. The understructure of the church has survived and is well preserved. It contains an apse and a dome vault that is partially surrounded by a vault corridor. According to latest studies, the structure consisted on two levels. The underground floor has a main hall with a height of 5.7 meters and a diameter of 12 meters and is covered by a dome. Probably, at this level, the relics of the two saints were stored.

The hall was partially enclosed by a deambulatory with a width of 2.5 meters and a height of 7.5 meters that was horseshoe-shaped. The hall opened at its eastern part to a bema of rectangular shape. It has in its right part remnants of a spiral staircase through which the second floor of the church was reached. There is a small room with an apse in the left part. The building was decorated with marble and the small room

with an apse that has preserved wall paintings from X, XI and XII century [17].

Patria [18] informs us that the martyrium is a copy of the "Church of the Resurrection" in Jerusalem.

The holy spring still exists and is opposite the Martyrium.

Until 2011, it was not possible to study in detail any part of the church. It was only after the change of ownership that archaeologists were allowed to investigate. During their work, they found additional inscriptions and frescoes in the northern section of the substructures that had been unknown until that time. It was proven that the building was indeed dedicated to Carpus and Papyrus as A. Schneider had claimed earlier. A new fresco with the image of St. Dimitrius riding a horse, holding a spear in his right hand, and his face looking backwards, was found. His face and torso are well preserved as the head and the neck of the horse are. He is wearing a light-yellow mantle around his neck. The whole image is in a frame of red outlining its four sides.

An image of Christ was also found that is not so well preserved. The fresco is square in shape, enclosing a circle with a bust of Christ. There is an inscription of black letters in Greek around this circle. At the corners of the fresco, between the square and the circle, in the formed triangles, there are drawings of seraphims with the image of Christ in this circle being well preserved. The inscription around it is: „For God hath looked down from the height of his sanctuary; from heaven did the Lord behold the earth“(Psalm 102:19) [19].

The frescoes are presumably dating back to the second half of XIII century.

In summary, it may be assumed that the church is an exquisite sample of early Byzantine architecture and was not, however popularized. The exceptional event that it has survived until today, gives us the chance to fully study, preserve and protect it for future generations.

## 3. The Church “St. Mocius”

One of the churches of an unknown location in Constantinople is the one of St. Mocius. It is known that it was constructed above a pagan temple. Sozomenos [20] was the first to suggest the location of the burial of St. Mocius, and other authors mention that the church was constructed by Emperor Constantine I on the temple of Zeus and Hercules [21]. When the church was completed, the saint’s relics were moved there.

During the rule of emperor Theodosius I (379-395), Aryans settled around it and began using it as their church. This shows us that at that time, the building was outside the city walls because the same emperor did not allow the existence of other churches except Orthodox ones [22] in the city.

The authors claim that the buildings constructed above the pagan temples of Zeus did not exist for long. The church collapsed only 7 years after its construction and collapsed for a second time during the reign of Emperor Constantine II (337 - 340). It was restored but its dome collapsed during Aryan service and a lot of Christians died. It was also restored during the reign of Emperor Justinian but the building collapsed again in 718 during the reign of Emperor Leo III (717-741) and collapsed partially again in IX century when it was again restored by Emperor Basil I (867-886). There was a monastery around it and the church existed in XII century during which time the quarter around it was called by the same name. The building was obviously in a poor condition at the end of XIV century as Emperor John V Palaeologus (1341-1391) destroyed it totally and reused the materials from it for the repair of the Golden Gate.

Official ceremonies in the presence of the emperor's family were done in it. Emperor Leo IV (775-780) was sheltered there during an attempt on his life.

It is not possible to reach a consensus as to the architecture of the church. It is known to have been large. It is possible that it was initially built in the shape of a basilica but what happened and what changed in it during the subsequent repairs and erections is not known. Niketas Choniates [23] told us in VIII century that the church was so majestic that it outshines all others [24]. Constantine Porphyrogeniti [25] specified that it has three apses, a gallery and a very large atrium.

Most probably, the church was erected on hill VII (fig. 3) near the Cistern of Mocius. In October 1993, during excavation works on Ali Sir Nevai Street in Kocamustafapasa, which is within the above location, remnants of a building dating back to the Byzantine period and several graves were found. A capital and a base of Late Roman column were also found. Unfortunately, no further excavations have been done because the construction of the building at this place destroyed all remnants that probably belonged to the pagan temple below the church [26].



**Fig. 3** The hills of Constantinople.  
<https://istanbul.ktb.gov.tr/>

As we can see from the information about the building, its history is extremely intense and rich with historical facts. In spite of that, we cannot localize it exactly within Constantinople. Additional efforts to this effect are necessary but in spite of its physical absence, it remains one of the few known architecture monuments in the capital of the empire and, with what we have seen, quite undeservingly.

## CONCLUSION

All three church architectural Byzantine monuments that we here examined reveal to us a little-known part of Byzantine history and architecture that have survived until our time with their rich material and historical inheritance and a lot of architectural monuments in the neighbouring countries and throughout Europe are based on them. Their correct understanding, analysing, and interpretation help us understand and trace the mutual relations of the external influences related to it and the internal processes that Byzantines so skilfully used in their favour. The churches, palaces, fortified walls and ports are a part of the sense of identity and affiliation of the inhabitants of the Byzantine capital. It is important to know its variety and richness because it is also a part of world cultural heritage. A relatively great part of those monuments await to be discovered and thus, to fill in and clarify the gaps in the missing or contradicting facts we possess nowadays. One thing is sure - Constantinople has yet to reveal a lot of its secrets.

## NOTES

- [1] Theophanes the Confessor is an aristocratic but ascetic Byzantine cleric and chronicler.

- [2] Georgi Kedrin is a Byzantine historical writer from the end of XI AD to the beginning of XII century.
- [3] The last great Byzantine Church historian in XIV century.
- [4] Themistuis is one of the most popular rhetors and philosophers of Late Antiquity. Although he is not a Christian, he was an attendant of the Christian emperors Constantius II, Julian Apostate, Jovian, Valent, Gracianus and Theodosius I.
- [5] De Rossi, J. and Duchesne L. (eds.) *Acta Sanctorum Novembris II.1*, Brussels, 1894. LII-LXV
- [6] *Martyrologium Hieronymianum* in *Acta Sanctorum LXXXII* November, part II (1894)
- [7] Cavallera F., *Patrologia Graeca Cursus Completus - Indices*, Apud Garnier Fratres, Paris 115, cols.217-40
- [8] Delehaye, H. "Saints de thrace et de Mesie » *Analecta Bollandiana* 31 – 1912. 161-291, at 228-32.
- [9] A Byzantine historian and layman. He was born in Constantinople, had a legal and rhetoric education. He was a continuer of the Church History of Eusebius Pamphili from 325 to 439.
- [10] Soc. HE 2.38.40: μεταφερει το σωμα του βασιλεως εις την εκκλησιαν εν το σωμα του μαρτυρος Ακακιου απεκειτο.
- [11] The contradiction here is obvious because the life of St. Acacius specifies that he was decapitated. Whether this refers to the death of another Acacius at this place is not known.
- [12] Janin, R. *Constantinople Byzantine, Development urbain et repertoire topographique*, Paris 1950, p.343.
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- [15] Foss, C. *Nicomedia and Constantinople*, in C. Mango and G. Dragon (eds.) *Constantinople and its Hinterland*, 1995. pp.181-190
- [16] Alfons Maria Schneider (1896 - 1952) is a specialist in Byzantine archeology.
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## EMOTIONS IN HELPING BEHAVIOR

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### ABSTRACT

*The topic of helping behavior is especially relevant today and is the subject of scientific interest by a number of authors. Various studies are being conducted in this direction, because it is believed that education in supportive behavior may be a preventive measure against the growing number of aggressive behaviors, especially among children, students and young people. This paper provides a brief literature review of the impact of emotions not only on people's prosocial behavior, but also on the decision to help in a particular situation. 271 pedagogical specialists and students from pedagogical specialties have been interviewed in order to establish the driving emotion when we help, receive help, refuse help or do not receive help. The results are properly illustrated with the help of figures and analyzed in detail. On this basis, the relevant conclusions are made.*

**Key words:** emotion, helping behavior, altruism, pedagogical specialists, children, students, upbringing, education

### INTRODUCTION

The brief literature analysis aims to summarize the research of other authors in order to outline the theoretical framework of the problem. The place of emotions as a driving force in helping people's behavior is studied mainly from two sides:

- on the one hand, helping is likely to lead to positive emotions;
- on the other hand, good mood and positive emotion often make us more supportive of others [6].

It is believed that positive emotions help us to break away from selfish thoughts, from focusing on our own ego and to begin to take an interest in the people around us, to focus on them, their condition, their problems. A number of studies of the behavior of children, adolescents, and adults have shown that the positive emotions we currently experience inspire our selfless, helpful behaviors and increase our desire to do good much more than negative feelings. In addition, positive emotions are studied as a reward and additional stimulus, which is obtained as a result of prosocial action on our part [2]. The results of other studies give serious grounds to conclude that benevolent actions lead to an increase in the positive effect and meaning of the experience, even increase the vitality of the individual. This

happens even when the helper does not have direct contact with the object of his help. This is a matter of complete suppression of one's ego and lack of any selfishness in good deeds. People help and in itself this brings them a good mood, satisfaction, joy [5, p. 355] The authors make a successful attempt to study:

- the wide variety of available positive emotions that can provoke the performance of a prosocial act;
- it is proved that the direct contact between the perpetrator and the object is not obligatory for the good outcome of the situation;
- why and how the helping behavior actually leads to the improvement of the emotional state of the perpetrator [5, p. 352].

It turns out that spending money on others makes people happier than when they spend only on themselves. This can be established with the help of bystanders to assess the specific situation. When people have to evaluate their own behavior, it is difficult to rely on their self-esteem, which is often highly subjective. This requires the involvement of independent study participants who monitor helpers and make an objective, independent assessment of their behavior. It is through these methods researchers have found that many people experience more positive feelings when they spend money on others than on themselves. If not negative, then

the latter usually does not carry who knows what emotion or it is at least not so lasting. It is possible that objective observers are not even aware of the person's action, but only notice his unadulterated happiness [1, 201-202]. It has also been found that most people show strong group empathy and are more willing to help when serving the goals of the group to which they belong. Outside the group, they may show antipathy and unwillingness to provide help and support, because the desire for competitiveness and personal success is stronger, more pronounced. Manifestations of empathy are quite possible when the group goals have already been met and the interests of the group members are not endangered at all. It is also possible to weaken the desire for group empathy when team activity weakens, for example after a successful job [4]. A recent study by a group of researchers suggests that [6]:

- people who are sad are more likely to be willing to help others than people who are angry, angry, destructive or scared;
- the two emotions - sadness and anger - are colored in a negative shade, but affect individual behavior differently;
- emotions with the same sign (negative or positive) have different effects on people's activity;
- the helpful behavior of sad people is not at the level of the helpful behavior of others who experience neutral emotions at the time of helping;
- the more empathetic a person is, the more he helps others - he invests more time, energy, effort, desire and resources in prosocial activity aimed at other people and not at his own well-being and prosperity;
- the most important thing is to develop the ability to show empathy from the earliest age of the child and the student;
- it is important to assess how the emotion affects the decision to do good to the other;
- in order to reduce the degree of uncertainty and inconsistency, it is important to develop lasting skills to make informed choices that determine behavior, rather than a decision influenced by the current emotional state, especially in adolescents when emotional culture is not yet developed;
- regardless of empathy skills, the assessment of the situation is in fact often decisive in deciding whether to help the other or

not, and his feelings are also taken into account by the actors;

- the perspective of the decision and the possible consequences of it are also very influential in the choice of follow-up - for example, some people choose to help when they are angry, but only to reduce the strength of the negative emotion and when possible to go out faster than the situation (teacher gets angry that the student is unprepared for class and rushes to serve him with a pen to avoid a long argument);
- if emotion really influences human behavior, then in children's groups, in classes, in social support groups, one can actively work towards the development of social skills, including empathy skills, in order to stimulate more frequent decision-making to help the other than children and students to aggression in different situations, especially under the influence of negative emotions such as sadness, anger, rage, fear [6].

## RESEARCH

271 pedagogical specialists and students from pedagogical specialties took part in the survey. The main goal of the research is to study their opinion about the helpful behavior in the modern life of people and in particular what is the place of emotions in their altruistic actions:

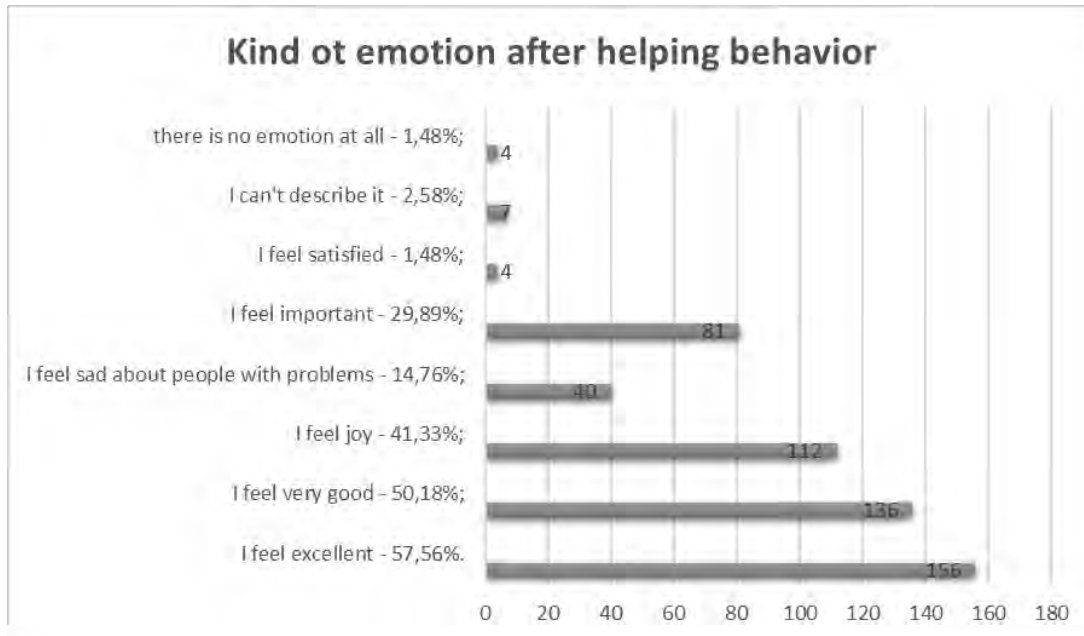
- factors of helping behavior - current mood and gender of the helper;
- importance of the family environment for education in supportive behavior;
- children and adults are altruistic or selfish;
- helping behavior against aggressive behavior;
- reasons for helping behavior;
- emotions in helping behavior.

The survey was conducted entirely online with the help of the Microsoft Forms application for two years, and the respondents had access to the survey through a link sent to them. The desire of the respondents to participate in the survey is impressive.

The questionnaire consists of different groups of questions, the results of which are analyzed in several publications. The emphasis here is on the emotion of the individual and its influence on his behavior. A key point in helping behavior is the emotion a person experiences after supporting another (Fig. 1). 57.56% (156 people) feel great, 50.18% (136 people) - very good, and 41.33% (112 people) feel genuine joy

because they empathize with the person they helped. There are other opinions, of course. 14.76% (40 people) say that they find it very difficult for people who can not cope with their problems, and 29.89% (81 people) feel significant in the eyes of people, and 1.48 % (4 people) - satisfied. There is a very small number of respondents who cannot describe the emotion

- 2.58% (7 people) or believe that there is nothing special in this experience - 1.48% (4 people). It is important to study the emotion after helping, because in itself it can be a reason for the next altruistic manifestation or vice versa - to deny the individual helpful behavior in the next situation.



**Figure 1. Respondents' opinion about the emotion they receive after helping another person**

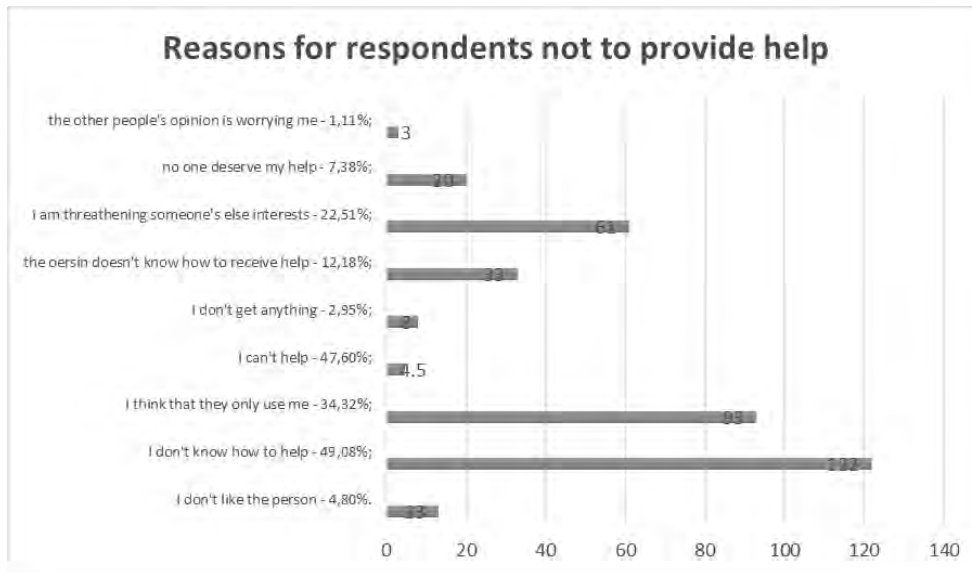
In addition to the options indicated in the questionnaire, the respondents also share:

- I am glad that the person is no longer in difficulty;
- I rejoice in every success, whether it is mine or someone else's - even more so if I have contributed to it;
- it is nice to see happy and joyful people and you know that you have helped for that;
- I certainly do not feel well if I fail to help, I even continue to look for a solution to the problem over time;
- I feel that in this way I help myself;
- it is an emotion you want to experience again;
- I am calm that there is mutual help between people;
- other people's happiness is my first.

Despite the positive emotions (Fig. 1) and the undeniable satisfaction that respondents feel when they help those in need, there are still cases

in which they do not respond to other people's requests (Fig. 2). This happens when:

- the person is not pleasant to me - 4.80% (13 people);
- I do not know how to help - 49.08% (133 people);
- I feel that they use me - 34.32% (93 people);
- I can't help - 47.60% (129 people);
- I only help and do not receive anything in return - 2.95% (8 people);
- the person on the other side does not know how to accept someone else's help - 12.18% (33 people);
- I endanger the interests of another person - 22.51% (61 people);
- someone does not deserve my help - 7.38% (20 people);
- I am worried about the opinion of those present - 1.11% (3 people);
- only 32 respondents (11.81%) emphasize that they never refuse help.

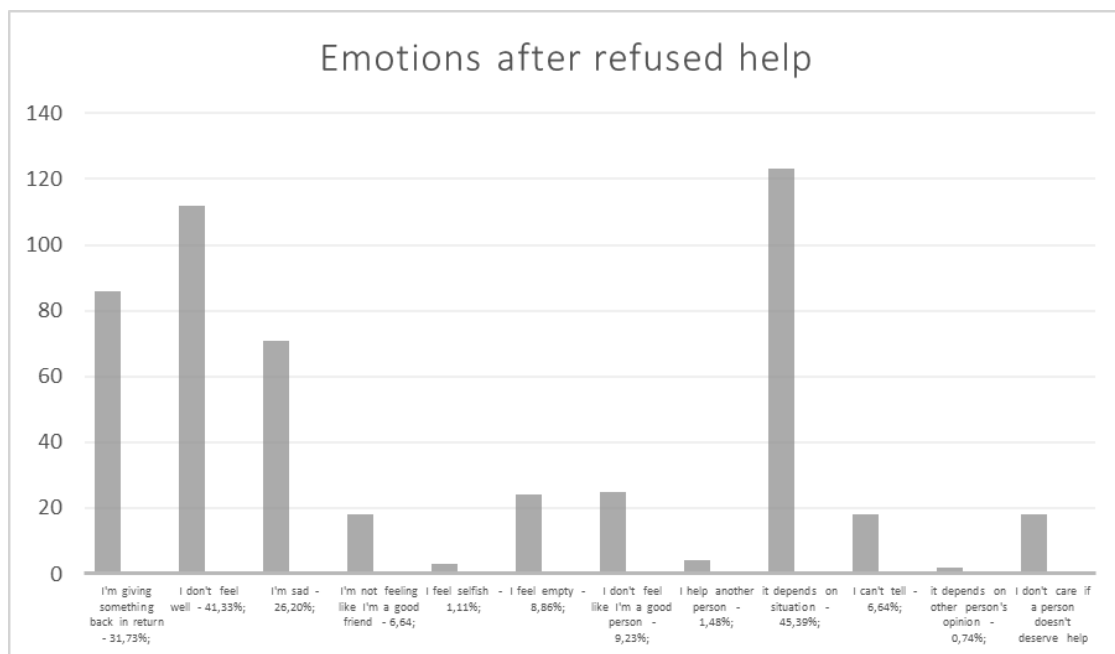


**Figure 2. Reasons for refusing a request for assistance**

Respondents indicate other reasons, including: lack of opportunity; the person on the other side relies on constant help; abuses the helping hand and the patience of the helper; there is a risk for the provider; the peace of mind and tranquility of the helper is disturbed. A relatively small number of respondents emphasize that they see no reason to refuse help - even just with advice, kind words, moral support, foreign intervention of third parties, but will find a way to respond to the request of a person in need.

When they do not fulfill a request for help (Fig. 3):

- 86 of the respondents (31.73%) look for ways to get revenge quickly;
- 112 (41.33%) do not feel well;
- 71 (26.20%) feel sad;
- 18 (6.64%) feel traitors;
- selfish - 3 (1.11%);
- feel inferior - 24 (8.86%);
- are not perceived as good people - 25 (9.23%);
- help another person to calm their conscience - 4 (1.48%).



**Figure 3. Respondents' opinions about their feelings after another person had refused a request for help**

The highest percentage of respondents - 45.39% (123 people) - believe that everything depends on the specific situation, and 18 (6.64%) can not judge. 17 respondents (6.27%) indicate that an unfulfilled request for help does not affect their emotions if the person does not deserve help. Other people's opinion is always important for people and two respondents emphasize that it all depends on what others think of them (0.74%). Some of the respondents do not feel particularly well; others close in on themselves and reconsider the situation over and over again; they ask themselves, "Does being denied help make me a bad person?" others are guzni, and there are those who trust their intuition entirely.

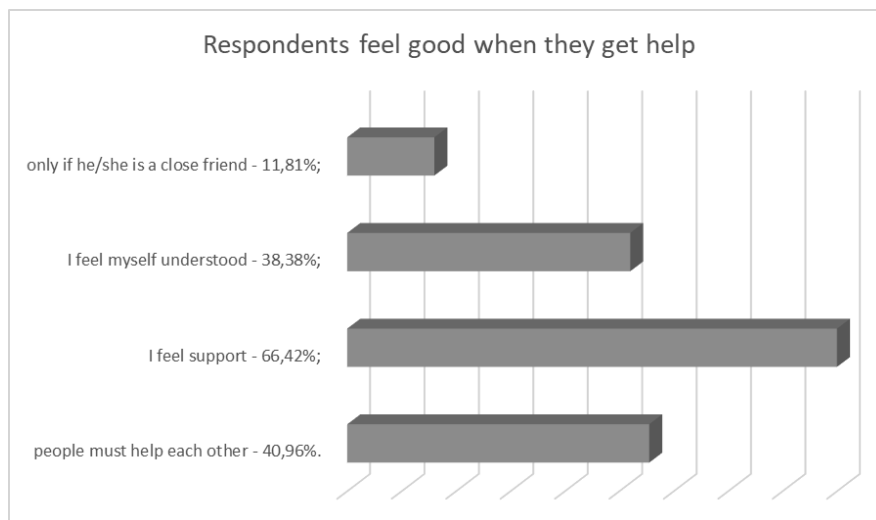
It is important for the purpose of the study to track not only how respondents feel after they

have helped, but also when they have received help (Fig. 4). Their answers are quite varied:

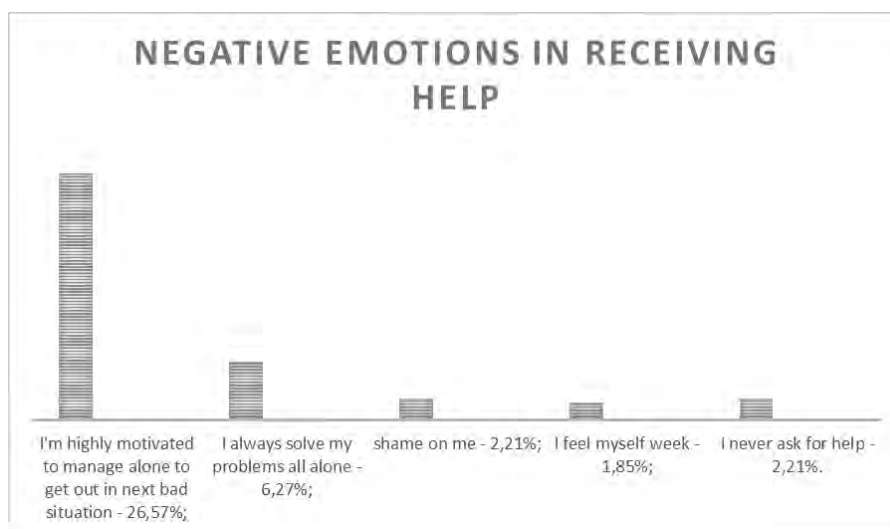
- there is nothing wrong with people helping each other, the opposite is not right - 111 people (40.96%);
- I feel the support of the people - 180 people (61.25%);
- understood, accepted, loved - 104 people (38.38%);
- I worry if the person who helps me is not close to me or a friend - 32 people (11.81%).

Relatively less, but it should be emphasized that there are respondents who believe that asking for help is a sign of weakness. They feel different from the others and share that (Fig. 5):

- are motivated next time to cope more successfully in a situation of difficulty - 72 people (26.57%);



**Figure 4. Respondents' opinions about the emotions associated with receiving help**



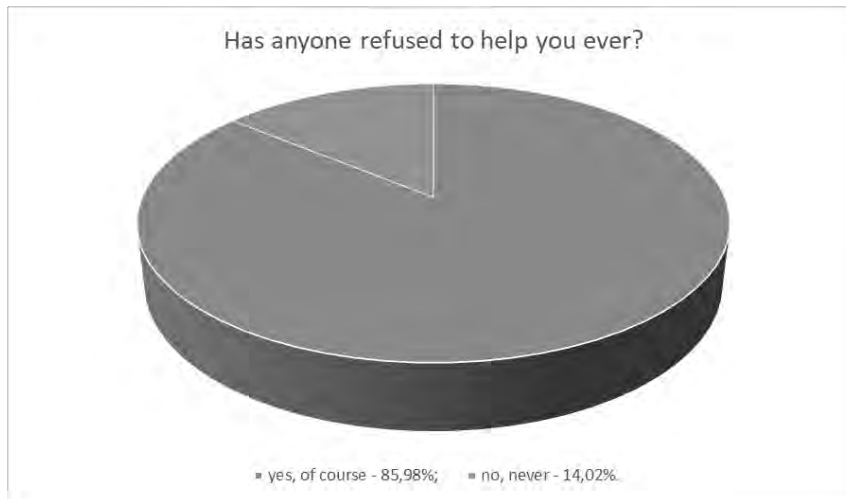
**Figure 5. Respondents' opinion about negative emotions when receiving help**

- I always solve my own problems - 17 people (6.27%);
- I am ashamed - 6 people (2.21%);
- weak - 5 people (1.85%);
- I never ask for help because it is a sign of weakness - 6 people (2.21%).

12 of the respondents (4.43%) cannot judge. In addition, some respondents said that no matter how difficult they are, if they can cope on their own, in most cases they do not seek help because

they do not want to feel vulnerable, obligated or burdened. Other subjects are happy, calm and very grateful, regardless of the motives of the helper. One of them (0.37%) emphasizes that he gets used to the help.

85.98% (233 people) admit that they have been denied help. The remaining 14.02% (38 people) emphasize that this has never happened (Fig. 6).

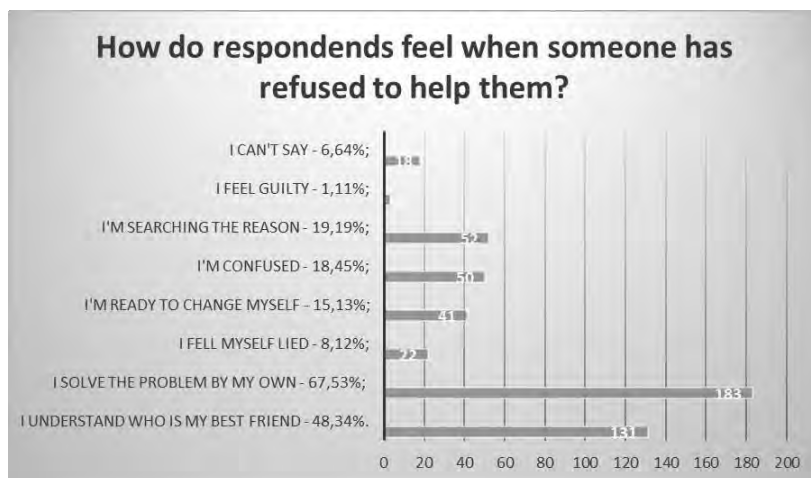


**Figure 6. Was the help of the respondents denied?**

Of course, it is appropriate to examine how the respondents feel when they are denied support when a need arises. The answers are again quite varied, as follows:

- I understand which people I can count on in my life - 131 people (48.34%);
- I find the strength to deal with the problem alone - 183 people (67.53%);
- deceived and robbed - 22 people (8.12%);

- motivated for change - 41 people (15.13%);
- confused and desperate - 50 people (18.45%);
- I am looking for the reason for this - 52 people (19.19%);
- I look for guilt in myself - 3 people (1.11%);
- I can't judge - 18 people (6.64%).



**Figure 7. If I am denied help, I feel...**

Some respondents added that they were hopeless; minimize their expectations so that there are no disappointments; show understanding by looking for the cause or realizing that one cannot always help; it is enough just to be heard (Fig. 7).

## CONCLUSIONS

Based on the study and the results obtained, several main conclusions can be made:

1. It turns out that there is an emotion in the helping behavior and it is most often positive. People who have supported others feel good, happy, meaningful. The number is small, but there are still respondents who emphasize that the emotion cannot be described in words or there is no emotion at all.

2. Of course, there are a number of reasons to refuse a request for help. Here, too, it can be said that there is a motive for selfishness: I am not repaid for my help; I don't like the man; I disapprove of his behavior; I think they use me. It is interesting to note that respondents also report people's ability to accept help - if they refuse support, this may be a reason not to. Again, there is concern from bystanders.

3. The highest percentage of respondents indicate that they do not help when they do not have the opportunity or do not know how.

4. More than half of the respondents say that they do not feel well if they refuse a request for help and look for a way to get revenge or help another person. And here the highest percentage of people determine their behavior according to the situation. There are only a few who do not experience negative emotions, especially if the individual did not deserve help.

5. Regarding the emotions associated with seeking help, opinions are quite contradictory. They can be summarized in two main groups: containing positivism and containing negativism. It turns out that while some respondents feel happy, accepted, understood, calm, others prefer to solve their own problems and consider seeking help as a weakness - they do not want to remain indebted to anyone, to be vulnerable or to be used against them.

6. Almost all respondents admit that they have been denied assistance.

7. Regarding the denied help, the respondents react differently - some of them are very upset, but others show understanding towards people. Interestingly, the largest percentage are motivated and find the strength to deal with the problem on their own, which means that they find a way out of the situation in the face of the threat of not respecting their request for help.

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## THE MEDICAL TOURISM SOCIAL AND PUBLIC BENEFITS IN THE DEVELOPMENT OF TOURIST SERVICES

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### ABSTRACT

*The authors consider the medical tourism as a complex of relationships of social, public, psychological, medical, sports, health and other nature activities, which are included in the content of tourist activities to satisfy the tourist services of persons with special needs to ensure their active social functioning. The specific form of psychosocial work with persons with special needs for tourist services at all levels in the tourist industry is analyzed.*

*The article covers a study of trends in the development of contemporary and modern health and medical tourism. The process of combining medical with tourist resources is one of the most promising and attractive areas of entrepreneurship. In the era of COVID-19, the problem of seeking a modern approach to improving the quality and level of development of both the health and tourism industries is particularly acute. At the same time, its dependence on the availability and condition of resources in the region in terms of diversity in the profile affiliation of medical institutions, world level of training of medical workers, attractive conditions of hotel facilities, professionalism in tourism services, etc. is crucial for this approach. Only in this way, medical tourism can develop in modern conditions and become a successful and marketable product. In this article, we discuss the need to develop the right marketing strategy and the importance of the dynamic advertising campaign for the regional medical tourism products.*

**Key words:** health tourism, medical tourism, spa-tourism, wellness-tourism, diversification, medical and health destination

### INTRODUCTION

The sustainable development of the socio-economic systems is followed and accompanied by a dynamic process of consistent implementation of positive changes. Many of them are aimed at harmonizing economic, social and environmental relations and aspects of human activity. In this sense, in the XXI century the modern expansion of medical tourism has restructured it into an independent branch of the tourism industry. According to the World Health Organization, by 2022 tourism and healthcare will become leading sectors of the world economy. The contemporary development of both -the medical and health tourism, generates a significant multiplier effect on the world economy and can become dominant in the formation of the state budget by turning it into a macro destination for medical tourism. Given that the organizational form of medical tourism favors international tourism, the

basis for the strategic analysis of its individual destinations should be tools that are unified for all countries.

### RESULTS AND DISCUSSION

#### 1. The development of the modern medical tourism

Before the period of the COVID-19 era, in the context of the dynamic progress of the world economy, in terms of tourism, there was not only a significant increase in tourist customer flows, but also a remarkable increase in the number of tourist destinations, types of tourism and tourist profiles, which reflects the continuing segmentation of the tourist market. In these processes there is a growing diversification of tourist demand and the corresponding diversification of tourist supply. Some destinations become multi-disciplinary, others reorient their product to new target markets, and still others revive "the lost"

market positions. These processes fully cover the resort destinations around the world.

In the modern global tourist space, the resort destinations are distinguished by a huge variety and specificity of their historical development, specialization of types and forms of medical tourism, types and technologies of services, target markets, the degree of coverage of the target audience and development trends. The health and medical tourism as a segment of the tourist market occupies a relatively small share in the global tourist flow. A characteristic feature is that the process of processing statistical data is difficult. This is due to the presence of a large number of subspecies and forms of health tourism in different countries and regions of the world, many of which are not studied statistically, due to their national specific characteristics and the lack of special studies on the country-specific diversity of species, medical and health services. All this, on the one hand, complicates the study and solution of problems with the management of resort destinations, and on the other hand, shows the relevance of research projects and work in the field of resort activities and health tourism.

More and more experts from many countries around the world are devoting their research to the problems of sustainable development of resort destinations and medical tourism, which is caused both by the various opportunities created by the modern conditions for the development of the tourist market, and by the emerging problems of the modern management of the resort towns. However, experts from all over the world note that today the growth of health tourism is so fast that the emerging publications on the problems of its development are not "in step" with the pace of its diverse growth. [9].

Throughout the history of tourism, people have travelled for healing and medical treatment purposes. The exact time of origin of health tourism is not known due to the lack of written evidence. However, researchers believe that "health tourism is as old as ancient history and as modern as the future"[11]. Health tourism is both a traditional, historically established practice that determines the purpose of travel, and a modern industry worldwide. It has a wide range of capabilities and services introduced by new technologies as a result of medical progress and the development of social communications. Modern medical tourism is aimed at maintaining or improving health and is focused on destinations and sites specializing in the provision of medical and health services: sea climatic resorts, balneologi-

cal or balneo-climatic resorts, thermal resorts on warm lakes, sanatoriums and hospitals for mineral waters and mud, thermal springs, mountain climatic and ski resorts.

Experts identify three main forms of health tourism:

1. treatment or medical tourism (trips to specific medical establishments or to specific specialists for receiving narrowly specialized treatment or the quality of treatment, which is not offered on the tourist local place);
2. recovery (fitness & wellness or spa & wellness; trips to specialized sites, such as mud or hydro pathological clinical cases; weight loss treatment; treatment with medical cosmetics; fitness and health resort);
3. rehabilitation (trips to destinations or sites, offering special care or located in regions considered to be particularly beneficial to health or recovery) [4].

Health tourism is becoming more diversified, which reflects the niche in the segmentation of this type of travel. Over the last decade, medical tourism has become a new fast-growing segment of this type of tourism and a large business that covers millions of travellers annually. [8]. Before that it was the so-called "Market niche" in the tourism industry, but now is widespread [2]. For many countries, medical tourism is a fast-growing global industry with huge incomes and with the attraction of a growing number of specialists from different medical profiles. All this reflects the growing demand for a wide range of medical services.

A distinctive trend of health tourism is its diversification, reflecting the diversification of traveller's demand and the corresponding market segmentation for the provision of health services. The segmented approach to this type of tourism reveals the consolidation and development of such segments as "healing", "clinical", "medical", "recovering", "thermal", "spa-tourism", "wellness-tourism", etc.

Modern tourists visit the same destinations for treatment and in many ways for the same reasons as for many centuries. But modern technologies and trends in tourism development, including demand diversification and tourism consumption patterns, have brought new destinations, opportunities and problems to the so-called "health tourism" industry. Tourists who used to visit Mediterranean resorts are now heading to Turkish hospitals equipped with the latest medical technology and specialists to receive treatment. Tourists head to India for high-tech cardiac

surgery. France has a health system with a rating of № 1 in the world, according to the WHO (2011) and the tourist demand for the services of French clinics in the world is growing.

The trend in the development of health tourism is the accession of an increasing number of countries and territories to the list of destinations for health tourism. For example, China has become one of the destinations for experimental stem cell therapy. Even the cruise industry complements its services on board of its ships with medical tourism [5].

New conditions and trends lead to changes that modern entrepreneurs with business interests must take into account in the combination of tourism and medicine. Such a change is extremely important, despite the fact that the factors for the development and growth of health tourism need to include and take into account the following new characteristics:

1. Age demographics: the rapid growing of old-age population in many rich countries around the world has increased the demand for health services. Older tourists find treatment options without waiting lists and lower prices of similar services for treatment of chronic diseases in tourist destinations of health tourism;

2. Growing emphasis on "youth culture": a culture of "youth" is being formed in Western countries (especially in the United States), which means that the concept and ideology that at any age you should look and be young and healthy, with all your appearance to radiate physical health, beauty, strength, endurance, resourcefulness. This is manifested in the desire of people to slow down the aging of the body and appearance and becomes an important cost element that people plan to spend on their income along with holiday expenses, real estate or luxury goods. The contemporary and modern tourists expect positive changes from medical tourism and order cosmetic procedures and other anti-aging therapies;

3. The pricing and cost of health services (an important factor for medical tourism): cost savings for those who do not have health insurance in their country, limited insurance or large deductions for medical care. For less money, such tourists can receive more attentive service than at home, including well-equipped accommodation facilities for themselves and their companions;

4. More media attention to medical tourism: the potential clients today are well informed about the possibilities of medical tourism. For example, in 1990 there were no reports of medical tourism

in the English-language media, in 1992 there were eight reports, and in 2007 there were already more than 2,300 such reports. [1]. In the web/internet space on 29th of July 2017 Google finds 11 000 000 results in which the term "medical tourism" is used. After 2 months, this number increases to 15 000,000. By mid-January 2012 - 17,370,000 results [3,13]. By 2020, the search results are - 21,800,000.

5. Greater accessibility of tourism services: The reduction of airline tickets around the world, including the entry of low-cost airlines on the market, has made tourism accessible to mass travellers, including "medical" tourists. The situation now is such that people are more aware of the possibilities in the field of medical and health services is a reality and more and more people have the desire and opportunity to travel.

A significant trend in the development of health tourism is the more effective impact of this type of tourism on the economy of the destination, increasing the level of medical services and health care in general, which means improving the quality of life of local residents of host regions and countries. Tourists receive high quality medical care at a reasonable price, and the money they spend supply other sectors of tourism, health care and local economies, as well as improving public health in countries that are tourist destinations.

There are a number of problems in modern medical tourism, in particular: the responsibility of doctors, the reliability of services, medical secrecy, financial responsibility and security (in some countries, medical services are experimental or even dangerous and banned). A serious problem is the fact that in a world where health is increasingly seen as a commodity, tourists are buying illegal medical supplies (such as transplant organs). A clear trend in the development of health tourism is the rapid growth of such a segment as SPA tourism. Experts believe that it not only serves to prevent disease or treat chronic diseases, but also contributes to the harmony and stability of human. The expectations of tourists in SPA tourism can be classified as: time spent in a calm environment; relaxation and rest in comfort and quality; benefits for personal health and self-esteem from "water"; sense of security and care; professional and qualified staff; matching price with quality [1].

## **2. Trends in the development of health and medical tourism**

Health, and in particular medical tourism, on the one hand, contribute significantly to the sus-

tainable development of society, and on the other hand, can be strategically important as sources of ever-increasing income for the state or region. [3]. Medical tourism worldwide is one of the most dynamically developing types of tourism. Thus, according to the forecast of the World Health Organization (WHO), by 2022 tourism together with the health sector will become one of the most priority areas for the development of national economies. Health and medical tourism are a visit to clinics and resorts for medical and preventive purposes, both by citizens and by temporary residents' "persons" in the country for a period of 24 hours to 6 months. Currently, in addition to natural healing resources, such factors as the availability of developed tourist infrastructure, application of innovative technologies and techniques and highly qualified staff are becoming increasingly important for the development of health and medical tourism. There is also no uniform classification of terms used in different countries as a definition of health and medical tourism. For example, terms such as health tourism, medical tourism, wellness, SPA, medical wellness, etc. are used. Health and medical tourism are most often understood as tourism (travel, journey) for the purpose of recreation and health promotion within special health and healing programs. [2]. According to the WHO definition, health is not only the absence of diseases and physical defects, but a state of physical, spiritual and social well-being. [6]. The term "health tourism" is most often used when describing the stay of patients in specialized medical facilities and health facilities. It is recommended to separate the concepts of medical and health tourism depending on the "proportion of the medical component" in the overall treatment program of the patient. The treatment can be the main purpose of the trip, or it can be an accompanying part of the tourist idea or motive of the recreation.

Medical tourism is one of the modern forms of application of the motto of medicine of the 21st century - "Patients without borders", which is applied on the threshold of modern healthcare and tourism. According to the World Health Organization, medical tourism could become one of the most promising sectors of the world economy with a dominant impact on public health. [5] According to various international associations, revenues from medical tourism range from \$ 10.5 billion in 2012 to \$ 32 billion in 2019 and will continue to grow exponentially to \$ 3 trillion in 2025. In the countries that are

leaders in the choice as a destination for medical tourism, the annual income from the "import" of health and medical tourism reaches hundreds of millions of dollars and contributes significantly to the budget of the country and represents about 2% of world GDP.

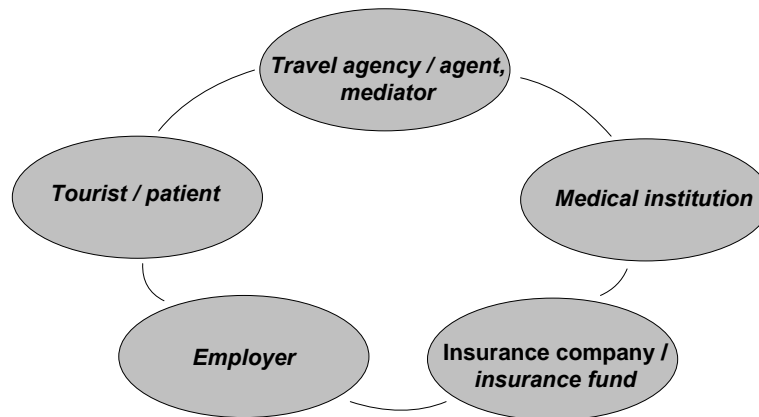
Health tourism includes the implementation of at least one of the three main groups of programs: prevention, treatment-diagnosis and rehabilitation. Health tourism provides a tourist patient with various medical services (prevention or rehabilitation, medical and / or non-medical treatment) in medical establishments (medical tourism) or specialized accommodation establishments, such as sanatoriums, dispensaries and other places for recreation (sanatorium tourism). [12]

Medical tourism, as a rule, includes the implementation of medical intervention on the basis of medical institutions in such areas as surgery, dentistry, ophthalmology and others. In addition, accommodation can be both in the medical institution itself and in a hotel connected to it (boarding house, sanatorium), in connection with which it is very difficult to obtain separate statistics on tourist flows that are directly related to the medical tourism.

We can say that medical tourism combines the provision of medical services and the relocation of a patient-tourist to a region or country other than his place of residence. Such a combination presupposes a combination of different expectations - expectations for the outcome of the treatment and expectations for new impressions of exploring new places. Medical tourism can be not only a starting point or motive for the trip, but also an internal stimulus for the socio-economic development of a region. From the point of view of providing services, medical tourism implies complicating the complex of services provided by travel agencies, because in addition to the usual package of services (accommodation, meals, plane tickets, train tickets, transfers, etc.) it is necessary to connect the time for the provision of medical services with a health facility, as well as to provide special conditions for accommodation and meals. At present, no unified approach to medical tourism terminology has been developed. There is also no consensus on how to properly call the client who has used the medical tourism service "patient" or "tourist", and who exactly can offer such medical tourism services - "travel agency" or "agent-intermediary". If a travel agency acts as an intermediary in the implementation of medical

programs, it is advisable to include specialists with higher medical education in the staff of travel agencies, in order to provide qualified services for selection of health and medical tours, or the performance of such services must be performed by intermediary companies that special-

ize in the provision of medical and health services. Such companies - tour operators of medical tourism, can work both directly with individuals and corporate clients - employers' organizations, as well as interact with insurance companies and visa centres (Fig. 1).



**Fig.1.** The Medical Tourism Life Cycle toolkit of key features

Due to the fact that the results and consequences of the operation can be unpredictable, and the length of the rehabilitation period varies depending on the individual characteristics of the patient, it is advisable to obtain a special medical visa for tourists and patients to stay in the country of residence for the necessary period of time.

In accordance with the current legislation, the employer may conclude contracts for voluntary medical insurance for the benefit of the company's employees, and the contributions, including insurance companies for payment of medical expenses and spa treatment of the insured employees, will be taken into account for tax purposes of the profits of the business organizations [13]. At the same time, people can receive social deductions for diagnosis, prevention, treatment and medical rehabilitation when receiving medical services, including on the basis of sanatorium organizations.

In order to attract additional inflows from health tourism, it seems appropriate to promote hospitals in the international market of medical and health services. To this end, it is important to identify at the state level priority areas in the field of medical and health services such as ophthalmology, cardiac surgery, in vitro procedures, etc. Research and experimental development in these areas should be supported in the framework of national targeted programs, as the development of health and especially medical tourism is based mainly on innovations

in the field of the public healthcare.

At the same time, it is important to support the formation of a system of insurance guarantees and the marketing promotion of health services on the international market. At the state level it is necessary to organize visa support for foreign tourists-patients. At the regional level, information and consultation centres for foreign tourist patients should be established and the interaction of regional medical public associations with medical associations of other countries should be facilitated.

## CONCLUSION

The increasingly dominant role in the economic circles of the concept for the development of modern medical tourism has been proven to be based on the assessment of the so-called medical tourism index. This process includes a unified toolkit of indicators through which a periodic analysis of the state of the macro-level of the destination country for medical tourism is conducted. Also, the approach should include a comprehensive socio-economic analysis; identification and selection of competitive advantages; formulating a concept for development and setting strategic goals. It is advisable to set strategic goals at the macro level for the respective destination offering services in the field of medical tourism, using SWOT analysis based on annual analytical materials, published in Medical Tourism Index, World Economic Forum: Travel &

Tourism Competitiveness Report; World Economic Forum: The Global Competitiveness Report.

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*The publication is under the project "Analysis of the opportunities for integration of medical and spa tourism in Southeastern region", Department of NIH - 443/2020 at the University Prof. Dr. Assen Zlatarov-Burgas.*

## THE PATIENTS-TOURISTS WITH SPECIAL NEEDS SOCIAL INCLUSION THROUGH THE MEDICAL TOURISM

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### ABSTRACT

*In modern society, the medical tourism has an important socio-cultural significance for the inclusion of patient tourists in the socio-public environment. In the era of COVID-19 it is necessary to form new algorithms for the inclusion of different social categories of the population to favorable conditions for social communication and leading a socially significant life. The flow of patients-tourists is increasing, more and more people with disabilities are appearing, who need adapted conditions for consumption of tourist services within the medical tourism. These social services should be accessible to all patients, although most of them are in low mobility condition. The existence of many social barriers must be overcome and one of the solutions is the medical tourism and the acceptance of need of contemporary motivational model.*

*The article proves the need of a contemporary motivational model to be applied in medical tourism which is one of the most promising and attractive sectors of entrepreneurship in Bulgaria. We propose a motivational model, according to which the medical tourism should be positioned as a priority area and as a result to highlight its strategic importance for the socio-economic development of a particular region or even a country, that is belonging to a community. The combination of medical and tourist resources is a modern approach to increasing the quality and level of development of both the health and tourism industry. At the same time, its dependence on the availability and on the condition of the region's recreational resources is crucial for this approach, in which the medical tourism must become a successful and marketable selling product, because the mere availability of a recreational resource does not guarantee its high demand. Additionally, the need of development of appropriate marketing strategy as well as dynamic advertising campaign for the regional medical tourism products were analyzed.*

**Key words:** *medical tourism, health tourism, motivational model, strategy spa, wellness, marketing product*

### INTRODUCTION

In our time, there is a trend of dynamic development of the so-called medical tourism, because tourism and public health are two of the most important areas of activity in the contemporary and modern economy, aimed at meeting the needs of people and improving the quality of life of the population. The sequence between the tourism industry and the business interests in public health plays an important role in solving socio-economic problems, because it ensures the development of small business in both areas and helps to increase revenues at regional and national level. [6,14] Medical tourism can be defined as the travel and residence of people for the

purpose of preventing, maintaining, stabilizing or restoring physical, intellectual and social well-being and status through the use of specific medical services in a destination other than permanent residence and work.

The characteristic subtypes of health tourism are distinguished on a motivational basis and are as follows:

- health medical (medical) tourism - travel and residence for inpatient treatment or rehabilitation after treatment;
- health preventive tourism - travel and residence to prevent specific diseases;
- health wellness or spa tourism - travel and residence to improve well-being by unloading

and recharging intellectual, physical and spiritual strength.

In Bulgaria, it is well known that the following forms are typical for the contemporary and modern health tourism:

- according to the means and technology of implementation: health tourism in a clinical environment - clinical tools and technologies are used in hospital or sanatorium facilities; health tourism in out-of-clinical environment - hotels, sports and recreation centers are used;

- according to the length of stay in the tourist place or site: one-day health "tourism" – a form known as a "one-day spa" (Day Spa); short-term health tourism with a duration of 1 to 3 nights in the tourist place; long-term health tourism with a duration of 13 to 20 and more nights;

- according to the place of practice of health tourism: health tourism in spa resorts (marine, balneological, climatic as Albena, Hisar, Jundola, etc.); health tourism in sanatoriums, also called "spa destinations" („Destination Spa”); health tourism in spa hotels; health tourism on spa cruise ships; health tourism in “spa” centers (separate sites with facilities and staff for water-based sports and recreation services). [12]

Recently, there has been a growing interest in health tourism in the world, which is associated with the growth of urbanization and industrialization, the rapid pace of life and many stressful situations, the growth of the information flow, the unfavorable ecological situation and the immobilization, characteristic for the life and work activity of the modern man.

## RESULTS AND DISCUSSION

### 1. Strategic benefits of combining tourism with the public healthcare and the typical medical services

The economic potential of the simultaneous combination of the tourism industry with the business interests in the field of public health is of strategic importance both for the regional (local) authorities and for the enterprising business owners from these industrial branches. [5] The main motives, which are a prerequisite for this statement, can be described by the fact that thanks to the development of tourism and health care services is achieved by:

1. Increasing the dynamics in the regional financial flows, and as a result of the financial resources. Example: tourists temporarily staying on the territory, "import" and spend money, supporting local economic relations. In this sense,

the consumption of health and medical services during a holiday for tourism will certainly help to realize economic benefits, because the tourist becomes an active consumer of goods and/or services of different nature in a given region.

2. Improving the economic stability of the region, which creates favourable conditions for:

- the employment of the local population and the reduction of unemployment among the so-called “problem” groups of the population such as young people and women;

- the income growth of the local population;

- the improving of the quality and standard of living of the local population.

3. The development of the tourism sector can support the economic prosperity of businesses in related fields of activity (for example, of medical and health services activities), as the visible results will be in terms of: increasing the number and diversity of social, health and cultural and entertainment activities; localization of medical tourism depending on the availability of specific resource bases; modernization of recreational and entertainment complexes; improving the infrastructure and quality of transport, etc.

4. Improving the quality of life of the population in the territory, which has become an object of interest for the simultaneous development of health and tourism industry; improving the state of the medical, eco and socio-cultural environment. This is manifested to a greater extent in terms of increasing public attention and interest in maintaining infrastructure of modernized hospitals, environmental protection, preservation of architectural monuments, the formation of convenient and accessible transport infrastructure, etc.

5. Increasing the recognition, popularity and integration of the region; development of the competitive advantages of the region; expanding the opportunities for development of the region in the implementation of large-scale projects / programs for social, health and economic development of the region.

6. Improving the stability and sustainable development of the region, while reducing the risks of inevitable living in unhealthy conditions, in a health risk environment and in environmental uncertainty.

7. Improving regional competitiveness, which is expressed in a real assessment of the competitive advantages of the health tourist as a consumer who either shows interest, considering this tourist place as "worthy" of his needs, or not.

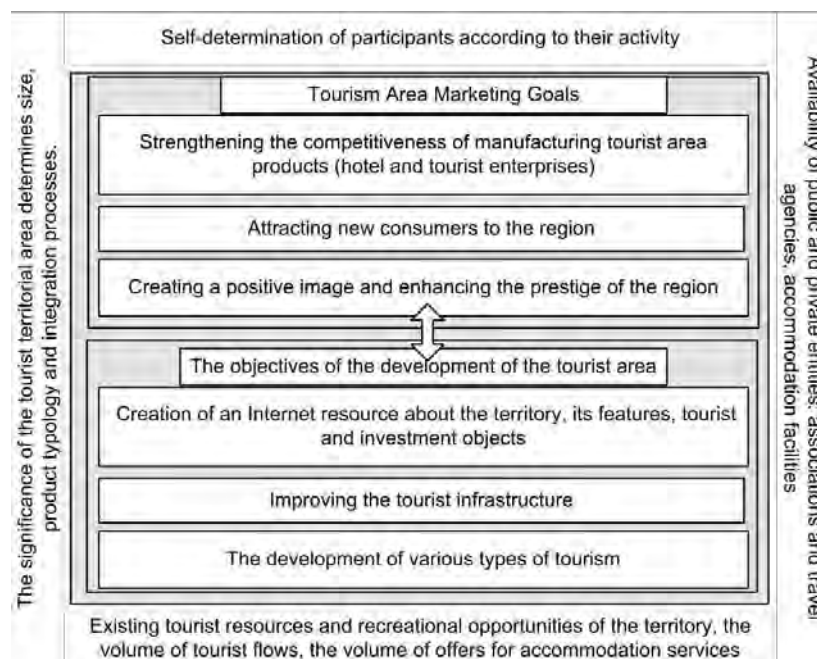


Thus, the regions are interested in increasing the attractiveness of the territorial tourist and health-improving zone, which is determined by the simultaneous combination of effective functioning of medical and tourist infrastructure, as well as by the availability of conditions for socio-cultural and health-improving adaptation of the region. [3] Particular attention should be paid to the fact that recreational resources as an object of tourist interest are primarily successful marketing products. Products that have received "bright and attractive packaging" and in the promotion of which emphasis should be placed on medical tourism, as well as financed from the budget at regional and national levels.

## 2. Motivational model for forming a tourist image in a regional aspect.

The concept of tourism marketing is related to the formation of a positive regional image "in the eyes" of stakeholders. Increasing profits by sell-

ing more tourism products is the main goal of tourism marketing. The developed tourist infrastructure and the tourist resources allow the tourists to form a positive opinion, an image of one or another territory, and the result can be an increase of the attractiveness of the territory, as well as of the regional image as a whole. This is a positive image that can benefit the regions and improve their socio-economic situation. The competitiveness and investment attractiveness of the region are largely determined by the prevailing social and economic conditions in the country. The determining factor for the investment attractiveness of the region, however, is its image, which has become ingrained in the perception of society. In the process of creating a brand in a tourist area, the same principles apply that are inherent in any other business – it is to strengthen the region's competitive advantages as a tourist destination and make its imperfections invisible (Fig. 1). [11,13]

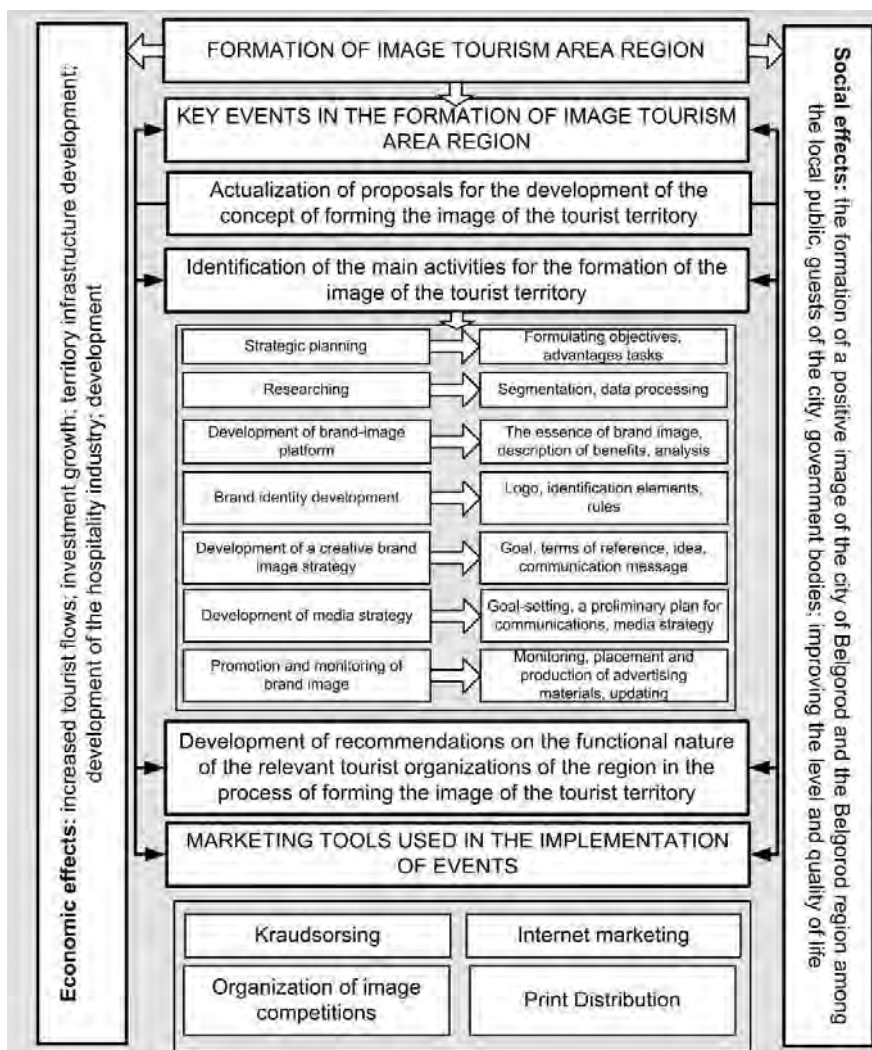


**Fig.1.** The regional process of targeting the tourism branding conception

The theoretical and practical study of marketing in the territory as a tool for brand development medical tourist destination is the basis for developing a model for creating an image of the tourist territory of the region, which offers and involves the use of the following marketing tools in carrying out activities that increase the attractiveness of the tourist area of the region (Fig. 2) [4,7,10].

The standard separation of medical tourism destinations from The Medical Tourist Index

(MTI) can be considered as a basis for an effective strategic management system. [2] The classification of medical tourism destinations is based on the general classification of The United Nations World Tourism Organization (UNWTO) and the regional classification of The Medical Tourism Association, which is used in countries for ranking according to MTI. The classification of medical tourism destinations with the definition of the general medical tourism index for each mega-destination is presented in Figure 2.



**Fig.2.** Processing of regional image formation model of the tourist territory key indicators

The diversification strategy can be implemented by introducing non-traditional types of medical tourism organization, which will reduce the overall costs of the tourism product. One of these types of medical tourism organization may be the opening of specialized medical departments on ships engaged in international voyages. The services can be provided either during the cruise holiday or in the ports where the ships dock [3,8].

The tourist image of the region is a reflection of the current state of its economy, living standards of the population, climatic factors, as well as features of history, religion, culture, social features, science and education, in general, the level of development and progress of the region. The importance of the topic of forming a tourist brand on the territory is related, firstly, to the high potential for attracting additional financial resources and secondly, to increasing the number

of tourists and expanding the range of tourist services in the region.

## CONCLUSION

An essential component in the motivational model for the development of modern medical tourism is the good marketing of the medical tourist product. It includes all the steps of the main product maintenance process: the formation of the conditions of stay, the offer of additional services, the planned and organized process of travel, with a detailed study of each stage, which would allow more accurately and fully achieve the purpose of the trip by the medical tourist. The outer layer of the "commodity bulb" is the positioning and promotion of tourism products aimed at forming high quality demand [1]. The positioning activities are aimed at creating attractive competitive positions of products. The competi-

tive position is determined by the cost of positioning and the branding efforts. It is advisable to promote not individual tourist products, but to position the service and the place of stay, to form the image of the place of stay and the overall concept and vision of the medical service, a set of impressions that the tourist can get from this type of tourism. Such ideas as: unforgettable impression, pleasant memory and desire to come back again and recommend the destination and the medical institution, should become the leading idea of the advertising campaign for the promotion of a medical tourism in a given region. The image building of a tourist region as suitable for medical tourism should become a unified task of the cluster (between entrepreneurs with tourist and medical economic interests), which unlike individual travel agencies has the necessary potential to solve problems with a similar level of scale of projects.

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*The publication is under the project "Analysis of the opportunities for integration of medical and spa tourism in Southeastern region", Department of NIH - 443/2020 at the University Prof. Dr. Assen Zlatarov-Burgas.*

## RESEARCH METHOD FOR STUDYING THE IMPACT OF TEAM LEADER'S PERSONAL CHARACTERISTICS ON TEAM PRODUCTIVITY IN THE IT FIELD IN BULGARIA

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### ABSTRACT

*The objective of this research is to design a questionnaire that will examine the relationship between the personal characteristics of team leaders and team productivity in the IT field in Bulgaria. A thorough literature review was done by different authors to elucidate the relationships between team productivity and other intra-organizational variables. During this research, many factors which affect the individual's and team's productivity were found. Among those factors, the personality of the team leader or the direct manager seems to have a significant role. The results from the questionnaire would have numerous implications for Bulgarian companies offering software and information technology products and services. A good understanding of the character and personality of employees and managers regarding their professional goals would directly affect not only the interpersonal relationships but also the productivity of the team in general. Insufficient research on this topic in Bulgaria leaves many questions open for enterprises and other organizations. This research could be a solid base for further examining the specifics of the Bulgarian IT labour market to enhance productivity.*

**Keywords:** *personality, productivity, team, working, hours, work, factors*

### INTRODUCTION

The productivity of the teams is vital for the organization. The influence of personality and personality traits is obvious. However, it is not clear how the relationship between the team leader's personality and the team's performance works. The study will give a better idea of this relationship by showing how certain personality traits of the leader can change the team environment. The Five-Factor Model for personality traits, MBTI and other personality analysis tools are useful in identifying which leadership behaviours are critical to team cohesion and productivity.

This study is conducted to design a questionnaire that examines the impact of team leaders' personality characteristics on team productivity and to provide empirical data on the relationship between the personal characteristics of employees with managerial responsibilities on work productivity. The focus of the research will be companies registered in Bulgaria in the field of IT.

The positive effects of this study suggest that understanding and further examining the impact of personality traits on job performance will guide companies and institutions in selecting suitable candidates for executives and managers.

This in turn will help achieve organizational goals and create quality and effective management processes.

### PURPOSE OF THE STUDY

The overall goal of this study is to design a questionnaire that will examine the relationship between the personal characteristics of team leaders and team productivity in the IT field in Bulgaria.

The specific objectives are:

- To identify the major personality traits that affect the work of managers and teams (independent variable).
- To examine their effect on job productivity (dependent variable).

### SIGNIFICANCE OF THE STUDY

Specific data on the state of the Bulgarian IT industry is regularly reported by BASSCOM — Bulgarian Association of Software Companies, as the last published results are as of December 9, 2020. Despite the COVID-19 crisis, the software sector has revenue growth of 10% with a 5.5% decline in GDP of the country. Compared to the previous year, revenue growth is lower (18.4% in 2019 compared to 2018), but it is still

significant considering the severe economic consequences of the global pandemic. The expectations are for sustainable double-digit growth for each of the following years until 2024 (14-19%). This makes the Bulgarian software sector one of the fastest-growing in the country. At the same time, the problem of staff shortages and high staff turnover emerges as a critical problem for companies.

Research findings can provide valuable information to companies and institutions, as well as to other researchers on whether personal characteristics should be considered as an important element in forecasting work and human resources.

## LITERATURE REVIEW

For more than a century industrial, organizational and managerial psychology examine the interpersonal interactions and human side of organizations, looking at the psychological mechanisms that unfold between people when they are united in a given executive framework.

Elton Mayo, the initiator of the human relations movement, was one of the first scientists to demonstrate the impact of groups in influencing individuals at work. He formulated the importance of psychological factors in the management of industrial enterprises and organizations [1] and attempted to describe and explain the experiences and behaviours of the individuals in the organization. The political situation and economic problems on a global level in the 1930s also contributed to the development of this branch of psychology.

Presently, these factors are inevitably taken into consideration by businesses to achieve greater performance and efficiency. Many procedures, employee programs & benefits, and retention strategies are incorporated into the HR policy of the companies, aiming to align the interests of the company and the needs of its employees. Work-life balance, quality of life and good working conditions are also becoming more and more important factors for candidates when choosing their future employer. In this era of digitalization, the human side of organizations came to be vital to organizational prosperity.

### Personality in the organization

Personality scientists study individual differences and similarities in cognitive processes, emotional behaviour and analyse the source. Personality tests are developed to assess and meas-

ure personality traits and behavioural characteristics such as friendliness, social dominance, emotional adjustment and aesthetic inclinations. Moreover, these assessments bring to light consistent tendencies between personality and job satisfaction, achievements, motivations, and behaviours:

- well-constructed measures of normal personality are valid predictors of performance in virtually all occupations;
- they do not result in adverse impact for job applicants from minority groups;
- using well-developed personality measures for pre-employment screening is a way to promote social justice and increase organizational productivity [2].

Career quizzes are an example of a personality test that is often used by organizations, universities, and other educational institutions, and psychologists agree that competently developed personality measures are valid predictors of real-world performance [2]. That being said, personality assessments would be highly applicable when developing recruitment and HR strategies, human resource planning, forecasting HR requirements to support the main objectives of the organization.

### Personality assessment tools

The question of personality has excited people since ancient times. The Greek philosopher Hippocrates (c. 460 – c. 370 BC) developed a classification for describing personality, which is still quoted today. He outlined four personality types according to an individual's "humor" or bodily fluids in one's body. The prevalent fluid defines the person's appearance, behaviour and psychological type – sanguine, choleric, melancholic or phlegmatic. Plato had written in *The Republic* of four kinds of character which clearly corresponded with the four temperaments attributed to Hippocrates – artisan, guardian, idealist and rational [3].

In the first half of the 20th century, these ancient concepts were revived by researchers such as Jung, Adickes, Kretschmer, Adler and Spranger. Against the background of the turmoil that characterized this period, the nature vs. nurture debate between psychologists formed – whether inherited traits or life experiences play a preeminent role in shaping personality. The history of psychology is rich in examples of such a confrontation of theories. Behaviourists' critiques of the mentalist paradigm, the cognitive revolution that heralds the end of behaviourism,

or the postmodern rebellion against the limitations of the information model and all of “traditional psychology” are examples of such revolutionary changes in psychological science [4]. Currently, scientists have agreed that both genetic and environmental factors are influencing personality.

### **MBTI**

With the increasing need for women's employment during World War II, employers were trying to optimize the hiring processes thus to help came the work of Katharine Briggs and her daughter Isabel Briggs-Myers who created the Myers-Briggs Type Indicator. Its purpose is to make the theory of psychological types described by C. G. Jung understandable and useful in people's lives. The essence of the theory is that much seemingly random variation in the behaviour is actually quite orderly and consistent, being due to basic differences in the ways individuals prefer to use their perception and judgment [5]. Although many organizations choose this type of assessment for the recruitment strategy, the indicator's validity was later continually debated by researchers. The four scales used in the MBTI have some correlation with four of the Big Five personality traits, which is a more commonly accepted framework [6]. Reinterpreting the Myers-Briggs Type Indicator from the perspective of the five-factor model of personality.

### **Five Factors Model**

The Five Factors Model of personality or “Big Five” (a term by Goldberg [7]) is widely used in management and sociology to forecast actions, behaviours and attitudes. Unlike MBTI, it presents each personality trait as a spectrum. It also considers both genetic inheritance and environment as factors affecting personality. The five-factor model of personality is a hierarchical organization of personality traits in terms of five basic dimensions: Extraversion, Agreeableness, Conscientiousness, Neuroticism, and Openness to Experience [8]. It is one of the most popular self-assessment tools with scientifically proven validity.

### **Productivity**

Employee productivity is vital for every organization. Productivity can be generally defined as the ratio between the input and the output for a given timeframe. Furthermore, the opposite of productivity is represented by waste, which must

be eliminated in order to improve productivity [9].

IT companies rely mostly on the contribution of the teams and the common efforts of their team leaders. Improper managerial practices and policies may have a negative impact on productivity and prevent employees from developing their potential to the fullest. In the last decade, the IT companies in Bulgaria started incorporating different benefits programs to increase productivity - training & development, additional paid time off, fitness subscriptions, even gaming zones in the office. Yet huge turnover rates are a rising problem in the industry. Different factors can affect team productivity but in a field where businesses become more and more creative in attracting and retaining employees, one of them seems to distinguish above all - the relationship with the team leader or direct manager.

### **HYPOTHESIS**

Job interviews are the most common way of finding and hiring employees. During my employment as a recruiter, I had the chance to conduct over 500 interviews with IT professionals working in the Bulgarian labour market, during which information about the candidate's experience, education, motivation and personality was gathered.

During thorough discussions with the candidates about their targets and motivation, one preference was clearly outlined - two out of three candidates shared that a positive working environment would be crucial to their choice (Figure 1).

This includes the interpersonal relationships formed with co-workers, as well as with their direct manager. On the other hand, after hiring is made, the most successful candidates are namely the ones who provide positive feedback about their team leader.



**Fig. 1** Percentage of candidates that highly value positive working environment.

Thus, a strong connection between team leaders' personality characteristics and job performance is expected:

- Extraversion: assertive, active, and sociable, as against reserved and cautious.
- Agreeableness: correlated positively with benevolence, tradition and, to a lesser degree, conformity values.
- Conscientiousness: correlated positively with achievement, conformity and security values.
- Neuroticism: It tends to correlate positively with hedonism and stimulation values and negatively with benevolence, tradition, conformity, and conscientiousness values anxiety, depression, self-consciousness, and vulnerability.
- Openness: This broad trait is thus most compatible with the values that emphasize intellectual and emotional autonomy, acceptance and cultivation of diversity, and pursuit of novelty and change [10].

To summarize the hypothesis that will be tested:

- Hypothesis 1: Extraversion is positively associated with team productivity.
- Hypothesis 2: Agreeableness is positively associated with team productivity.
- Hypothesis 3: Conscientiousness is positively associated with team productivity.
- Hypothesis 4: Neuroticism is negatively associated with team productivity
- Hypothesis 5: Openness is positively associated with team productivity

## RESEARCH METHODOLOGY

To test the hypothesis a questionnaire is designed. Gerard Saucier's adjective markers [11] of the Big-Five Factor Model structure will be used to examine further this question. It contains five consequently presented subscales, each with four pairs of antonym adjectives.

Using Goldberg's set of 100 terms [7], Saucier selected terms on the basis of the factor purity for each of the terms. This brief set underwent factor analysis, reliability analysis, and comparisons to factors from the set of the 100 markers. Eight terms were selected for each of the Big Five markers, totalling 40 "mini-markers". A slight revision of the new set was made in order to reduce the number of terms beginning with the prefix "un". Root negotiation pairs were reduced from 9 sets to 6. The set also attempted to contain roughly the same amount of socially desira-

ble terms and socially undesirable adjectives. All 40 items load highest on the expected Big Five factor. The factors that scored highest were more than double the second-highest loading, which fulfils the definition of factor purity [12].

According to Saucier following items have the highest factor loading and they form the 40 mini-markers:

- Extraversion: Bashful, Bold, Energetic, Extraverted, Quiet, Shy, Talkative, Withdrawn
- Agreeableness: Cold, Cooperative, Harsh, Kind, Rude, Sympathetic, Unsympathetic, Warm
- Conscientiousness: Careless, Disorganized, Efficient, Inefficient, Organized, Practical, Sloppy, Systematic
- Neuroticism: Envious, Fretful, Jealous, Moody, Relaxed, Temperamental, Touchy, Unenvious
- Openness: Complex, Deep, Creative, Imaginative, Intellectual, Philosophical, Uncreative, Unintellectual

Same mini-markers will be used for this study but not as a self-assessment tool. It has long been assumed that self-report assessments generally capture the central elements of personality for forecasting how individuals will behave at work. However, the personality reputations individuals create among their peers - which are not reflected in self-reports - are the most potent personality predictors of who will be successful in working and learning [13]. Participants will be asked to rate how accurately each of the adjectives in the questionnaire described the personality of their team leader. Ratings are made using a Likert scale in values from "Very inaccurate" to "Very accurate", and the neutral sign is denoted by "not sure". In order to avoid biased distortions and monotonous response styles, questions in the questionnaire are automatically disarranged.

The second section of the questionnaire is related to productivity (dependent variable) [14]. Multiple questions to assess individual productivity are asked - regarding working hours, overtime, billable hours, etc. The survey will be conducted anonymously using Google Forms.

## DESCRIPTION OF THE VARIABLES

- *Variable 1: How would you describe your team leader/direct manager?*

Using this question information about the main personality traits of the direct manager are gathered on each of the five factors: extraversion,

agreeableness, conscientiousness, neuroticism, openness to new experience.

- *Variable 2: Working week*

According to Bulgarian legislation, normal working time is in practice the most widely used working time and serves as a basis for determining working time, as well as for establishing and comparing all other forms of working time. Wherever there is an employment relationship, the organization of working time should be applied under the conditions of a 5-day working week with a normal working day of up to 8 hours and a working week of up to 40 hours. This variable is needed to be taken into consideration in case another working time organization is applied for the respondent.

- *Variable 3: Position*

The specific position would provide us with a general idea about the activities and the main responsibilities that the employee has.

- *Variable 4: Size of the team*

The size of the team could also affect the group dynamics, interpersonal relationships and are a good indicator of the scale of the projects the employee is involved in.

- *Variable 5: Type of the company*

This question provides information about the business organization - whether it is a product or a service company but also may indicate internal informal arrangements and groupings.

- *Variable 6: Number of direct managers/reports*

This variable indicates the number of employees that a manager directly supervises. The optimal number depends on the nature of the work, the need for closer cooperation, the nature of communications, spatial location, hierarchical levels and more. In addition, the potential number of relationships between people is not as significant as their frequency and intensity.

- *Variable 7: Overtime*

Overtime is present when work is performed by the employee outside the established working hours, by order or with the knowledge and without the opposition of the employer or the respective manager. Intrinsically motivated workers are willing to accept lower wages and "donate" work, for example, in terms of unpaid overtime [15]. Thus, overtime should be indicating increased productivity. Longer working hours should lead to greater output.

- *Variable 8: Deadlines*

Deadlines help managers coordinate efforts to achieve common objectives. Deadlines are an

important factor when planning, goal setting and controlling results. Correctly defined deadlines are critical to achieving success and a good tool for forecasting future results.

- *Variable 9: Active Work*

Active work is the hours per day during which the employee is earnestly and industriously involved in producing for the common goal. If a normal working week is in practice the active work should be less or equal to 8 hours.

- *Variable 10: Billable hours*

Billable hours require compensation by the client. Billable hours usually mean direct profit or the company. Non-billable hours may increase profit but are not directly related to the output.

- *Variable 11: Self-assessed productivity*

The answers to this question will reveal the potential for improvement and increasing productivity from the perspective of the employee.

## RESEARCH PHASES

- *Step 1: Compilation of a questionnaire*

It consists of the variables described in the previous section, systematized according to the logic of the study. The appendix provides the format for constructing the questionnaire with the first section based on Saucier's Mini-Markers format (Appendix 1).

- *Step 2: Determining the respondents*

The survey is designed to be completed by IT professionals and employees of IT departments in organizations in Bulgaria. There are no restrictions on the specific position and job activities that the respondents are involved in. This is due to the understanding that the dynamic relationship between leadership, employees and productivity could find application in different areas of the IT business and projects. The only condition for the respondents is to be familiar with the structure and functioning of business processes, processes and activities in the respective companies.

- *Step 3: Completion of the questionnaire*

The survey is provided online using Google Forms to employees in the target group of the survey.

## CONCLUSION

Process automation and business digitalization are now an integral part of any industry. Along with the technological transformation in



the production of goods and services, the shortage of staff and experts in IT and other technology sectors has increased. This leads to a need for optimizing working processes and increasing productivity with the resources available. Retaining human capital is also critical in the IT field, despite the rising unemployment rates in Bulgaria.

People-centred management is still a relatively new concept for Bulgarian businesses. Observations show that Bulgarian companies heavily borrow models for leading and motivating employees from Western companies, which applied locally may not achieve the desired output. These practices remain unexplored in the context of the Bulgarian market, which makes it difficult to implement an optimal strategy for management.

Additionally, the entry of Generation Z into the labour market will create new challenges for managers of enterprises. Understanding and knowing the motivation and personal goals of employees related to their careers directly affect not only the relationship between manager and subordinate but also the productivity and efficiency of the enterprise. Insufficient research in the field leaves many unanswered questions for company managers. This study could give a good base for conducting surveys and further examining the specifics of the Bulgarian IT labour market to increase productivity and minimise waste of employee efforts.

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## Appendix 1. Questionnaire

1. How would you describe your team leader/direct manager? \*

	Very inaccurate	Inaccurate	Not sure	Accurate	Very accurate
Bashful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Careless	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complex	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cooperative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deep	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Disorganized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Efficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energetic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Envious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extraverted	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fretful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Harsh	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Imaginative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inefficient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intellectual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jealous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moody	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Philosophical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Practical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quiet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relaxed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rude	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sloppy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Sympathetic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Systematic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talkative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Temperamental	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Touchy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Uncreative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unenvious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unintellectual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unsympathetic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Warm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Withdrawn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Do you have a standard working week of 40 hours (8 hours a day)? \*  
*If not, please enter your working hours per week (as stated in your contract).*

<input type="radio"/> Yes	<input type="radio"/> Else: .....
---------------------------	-----------------------------------

3. What is your job title/position you hold at your company? \*

4. What is the size of your team? \*

5. Do you work at a product or at a service company? \*

<input type="radio"/> We are developing a product.	<input type="radio"/> We are providing software services to different clients.
--	--

6. How many direct managers do you report to? \*

7. How often do you work overtime? \*

<input type="radio"/> Every day	<input type="radio"/> Once a week
<input type="radio"/> Once a month	<input type="radio"/> Else: .....

8. Do you manage to meet your deadlines? \*

Yes, consistently meet my deadlines.

Sometimes I fail to meet a deadline.

I often miss deadlines.

No, I am not able to meet my deadlines.

9. How many focus hours (uninterrupted stretches of work) per day do you work? \*

10. What percentage of your working hours are billable? \*

Less than 25%

Between 25 and 50%

Between 50 and 75%

Over 75%

I don't have billable hours

11. How would you rate your overall productivity? \*

	1	2	3	4	5	6	7	8	9	10	
Very unproductive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very productive

## APPLICATION OF SOCIAL-COGNITIVE THEORY IN EVALUATION OF INTENTIONS FOR THE USE OF DIGITAL TECHNOLOGIES TO INCREASE THE COMPANY COMPETITIVENESS

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### ABSTRACT

*Digital technologies are considered to be a vital tool for the business organization, while maintaining the required level of competitiveness. In order to apply a certain type of innovation in the field of information technologies, it is obligatory to analyze the positives and negatives that would result from the implementation of the innovation. It is well known that there are other factors influencing the decision to invest time and money in an invention, which are often influenced by social-psychological attitudes. In this paper, the authors seek to highlight the reasons, through the prism of social-cognitive theory, influencing the decision-making management in the implementation of two major digital technologies, namely - blockchain technology and "dropshipping" delivery model, in view of increasing the competitiveness of the business entity.*

**Key words:** social-cognitive theory, blockchain technology, dropshipping model

### INTRODUCTION

Increasing the competitiveness of the company is an important element of the successful management of the company requiring the application of both modern management practices and innovations in production and information systems. In their quest to increase the competitive advantages of the company, managers are often influenced by the so-called innovation-technological waves. According to H. Sun, (Sun, H. *et al.*, 2016), caution in choosing the appropriate information technology that is applicable in a business organization contributes to avoiding economic costs. Based on this statement, it is relevant to apply a model for assessing the intentions to use innovative technologies, which takes into account both economic motivators and socio-psychological motivators. In this regard, it is mandatory to highlight the advantages and disadvantages of the technologies identified for implementation, namely blockchain technology and the delivery model "dropshipping".

Blockchain technology (BCT) was officially announced in 2008 through the cryptocurrency Bitcoin by an entity presenting itself under the pseudonym Satoshi Nakamoto. In essence, it is a software program combining distributive ledger technology (DLT), public key encryption, consensus protocol, merkle tree hashing

(Nakamoto, S., 2008). These features allow the application of innovation in a wide range of industries, including: supply chain management (Deif A., Mohib A., 2019) (Kshetri, N., 2018); financial sector transformation and financial technology (McWaters, RJ, 2016); Industry 4.0 (Andrews, C., 2018); insurance sector (Stellnberger, M., 2018); smart cities (Wood, G., 2018). In support of the broad-spectrum application is the claim of (Tasca, P., Tessone, CJ, 2019) that blockchain technology is among the most promising technologies, which together with Artificial Intelligence (AI), Internet of Things (IoT) and nanotechnologies, will have had a significant impact on the future of our time.

Dropshipping is an evolutionary form of the classic supply chain. It differs in that traders do not maintain or manage inventories, but only sell, while suppliers (manufacturers, distributors) maintain stocks and distribute products on behalf of traders (Koprinkova-Noncheva, N., Dimitrov, I., 2020).

These facts would significantly influence the management decision to implement technology in the company but above all the relevant motivating factors must be reflected in research constructions arising from the social-cognitive theory (Perry et al. 1990). It should be noted that there are barriers that would negatively affect the

decision to innovate. The creation of the constructions requires the integration of the barriers caused by the negativism regarding the digitalization and automation of business operations.

The construction of the model in question is presented in the second part of the study.

### ESSENCE OF THE SURVEY

This study aims to highlight the main reasons leading to the implementation of innovation within the business organization. Management attitudes are influenced by various factors, both economic and psychosocial.

Economic factors include: achieving relevant profitability resulting from the implementation of innovation; gaining competitive advantages; positioning in global supply chains. Socio-psychological factors are associated with the influence of non-financial parameters. Economic factors can be measured by applying various tools to assess the risk arising from the introduction of innovation in the business organization. Socio-psychological factors need to apply methods to assess certain behavior, influenced by various reasons. One part of the reasons is economic, which is included in the analysis examining a certain behavior, but the other part is related to purely emotional motives.

The integration of economic and socio-psychological methods is possible by applying the theory of planned behavior and socio-cognitive theory (Perry et al. 1990). The model is present in Figure 1 and reflects the integration of motivators and barriers, influencing the attitude to use digital technologies to increase the competitiveness of the company.

According to socio-cognitive theory, there is a need to use three main constructions, namely - personality, behavior, environmental influence. According to (Bandura, A., 1986), the basic constructions consist of personal characteristics, maintenance (copying), behavioral abilities, per-

sonal efficiency, expectations, self-regulation, control, improvement. The described factors will be used to form a model for assessing the intentions to use digital technologies in order to increase the competitiveness of the company.

To achieve the desired result, the factors that are part of the research model of (Saber, et al., 2019) a part of a study conducted in the United States, identifying the motivators and barriers to the implementation of blockchain technology in supply chains. The same indicators will be used in the current model.

In the mentioned research model, the following motivators are described: transparency of business processes; development of a strategy for digitalization of supply chains; increasing information security; protection of intellectual property; reduction of intermediaries; use of smart contracts; efficiency and flexibility of operating costs; improving the processes of delivery of goods and services; corporate risk prevention; optimization of inventory costs; reasonable costs for integration of innovation; gaining competitive advantages; P2P communication.

On the other hand, there are barriers that limit the perception of digital technologies, expressed in: financial constraints; lack of company policy aimed at invention; lack of expertise in the company; features of the organizational culture; limitations arising from the available information system; lack of a benchmark in the area in which the company operates; ignorance of technology by customers; lack of coordination between supply chain partners for the use of identical technologies; sensitivity in sharing information; limited information infrastructure; negative opinions generated by the dark side of cryptocurrencies; impossibility to change the entered information, respectively refund of financial resources; insufficient development of technology; influence of external factors on the implementation of blockchain technology.

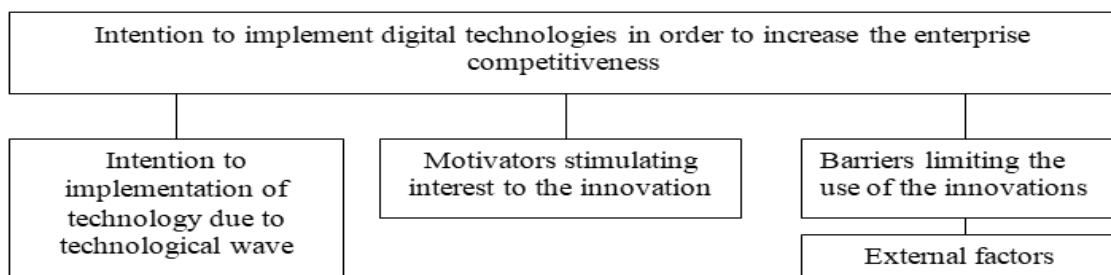


Fig. 1. Schematic representation of the intentions for the perception of digital technologies

The presented motivating and limiting factors require distribution according to the socio-cognitive theory. For this purpose, the following scheme is presented, which directs the positioning of the influencing factors according to the behavioral theory.

The attitude of introducing innovations due to a technological wave will be influenced by the use of technology by other participants in the business turnover, as the manager of the company will have the feeling that they are not innovative enough. In this case, the emotional arousal (copying) has a strong influence (Bandura, A., 1986), or in other words, a desire to be like others. In order to assess the impact of the environment, the initial data from a study in the economic ecosystem in Bulgaria will be used, reflecting the degree of penetration of blockchain technology and the delivery model "dropshipping" among economic entities.

Expectations (Bandura, A., 1986) are the next factor that requires consideration of the reasons leading to the decision to use digital technologies. The motivators (Saber, et al., 2019) mentioned earlier are positioned in this construct. The data generated as a result of the above study will be used to account for the leading motivators reflecting on the intentions to use the technologies.

Self-regulation (Bandura, A., 1986) is a factor that corrects emotional management decision-making (Bandura, A., 1986). An important place in this construct is occupied by the so-called barriers (Saber, et al., 2019), limiting the intention to use digital technologies within the business organization. Self-regulation is the final stage of any initiative related to a management or investment decision-making. It is most often applied with an analysis of the strengths and weaknesses, opportunities and threats, as a result of the result of the implementation of an initiative; the external factors influencing the management decision also find a place here.

The presented constructions, the analysis of the results and the interpretation of the initial data are presented in the next phase of the present study.

## RESULTS AND DISCUSSION

Following the prescriptions described in social cognitive theory, we first focus on business entities using technology in certain sectors. Figure 2 shows the areas that are considered to be the areas with the highest

potential for gaining competitive advantage as a result of the use of digital technologies.

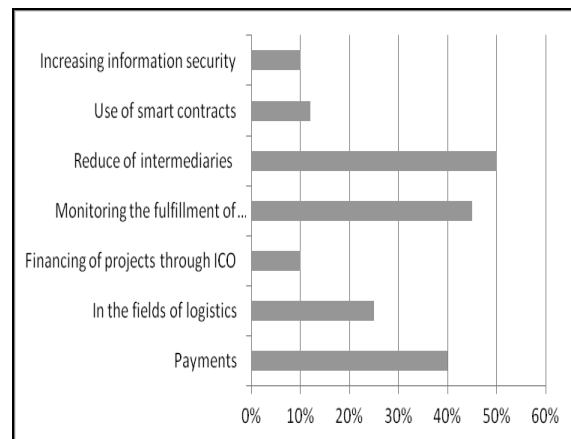


Fig. 2. Areas of application to gaining competitive advantages

The data show increased interest in reducing intermediaries, monitoring the execution of orders; seeking benefits in the field of payments; reducing the cost of maintaining inventories. These facts lead to the conclusion that the companies that have not adopted the innovation will look for future implementation of the technology in the mentioned areas, as their competitors take advantage of the described advantages.

The next influencing factor – expectations (Bandura, A., 1986), was studied through the motivating factors that are the subject of the next stage of the study.

In the course of the analysis, it is appropriate to identify some dependencies that are relevant to certain factors, such as a study of the motivators that provoke interest in the use of digital technologies. To achieve a reliable result, we use the rating scale of (Saber et al.), which consider significant results with values [ $> = 4$ ]. In this way we will summarize the reasons that would motivate company's management to implement digital innovations (Table 1).

The data in Table 1 illustrate motivators in the categories of increasing information security, digitalization of supply chains, the ability to use smart contracts, intellectual property protection, transparency and tracking of information. Looking at the previous figure, we find duplication of factors related to process monitoring. This fact shows that not only the striving for imitation but also the motivating factors lead to the search for competitive advantages in the mentioned direction.

**Table 1.** Motivators leading to the adoption of digital technologies

Motivators provoking the implementation of Blockchain technology within the company	Share of subjects who indicated answer [ $\geq 4$ ]
Increasing the transparency, traceability and immutability of information	80,8 %
Protection of intellectual property	83,3 %
Digitization of supply chains	84,6 %
Increasing information security	96,1 %
Reduction of intermediaries in trade processes	69,3 %
The ability to use smart contracts	84,6 %
Increasing the flexibility and costs efficiency	69,2 %
Improving the processes of delivery of goods	60,0 %
Risk prevention	77,0 %
Reduce the cost of maintaining inventories	61,6 %
Low cost of technology implementation	65,4 %
Obtaining competitive advantages	69,2 %
Interest in entering the ICO market	76,6 %

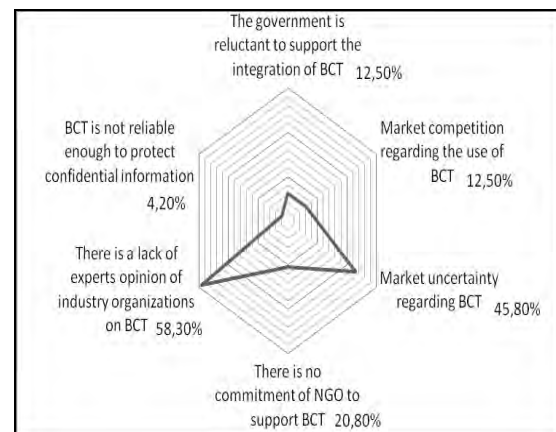
The next stage analyzes the barriers influenced by self-regulation (Bandura, A., 1986) which limit the perception of digital technologies. Self-regulation is a type of protection against making wrong management decisions and is overcome through analysis of strengths and weaknesses, opportunities and threats. Motivators belong to the opportunities and strengths, while threats and weaknesses are among the limiting factors. In this regard, we will examine the limiting factors and for this purpose we will consider the external influences of the organization. On the Table 2, the main barriers limiting the use of digital technologies and in particular – blockchain technology and the delivery model "dropshipping" are reflected.

The data show that the strongest influence are: the lack of expertise in the company; insufficient knowledge of the technology among clients and partners; lack of information infrastructure requiring all contagents to be part of a common blockchain network. These facts largely "cool" the optimism about the perception of digitalization as a new business model. External weighting factors also exert additional weight (Fig. 3).

The essence of the external influencing factors can be seen in the chart, as the most pronounced are: lack of expert opinion from the branch organizations on blockchain technology; as well as market uncertainty over technology.

**Table 2.** Barriers threatening the use of digital technologies

Barriers threatening the use of digital implementations	Share of subjects who indicated answer [ $\geq 4$ ]
Financial constraints	61,5 %
Lack of company and organizational policies and strategies	61,6 %
Lack of expertise in the company regarding the technology	80,8 %
The organizational culture would not accept the introduction of such a project	34,6 %
The current information system does not allow interoperability	30,8 %
Lack of a standard in the BCT toolkit for rapid integration within the company	46,2 %
Lack of knowledge among clients regarding Blockchain technology	69,2 %
Lack of cooperation and coordination between our partners for inclusion in Blockchain grid	61,6 %
Sensitivity to sharing information with contractors and other actors in supply chains	52,0 %
Limited information infrastructure caused by the requirement for all participants to be part of the blockchain ecosystem	69,2 %
Negative opinions about the BCT caused by the "dark side of cryptocurrencies"	42,3 %
The impossibility to change the entered information, respectively to recover incorrectly sent financial funds.	46,1 %
Insufficient development of the BCT	54,0 %



**Fig. 3.** External barriers to the company's integration into Blockchain technology's infrastructure

When preparing the analysis of strengths and weaknesses, there is a possibility that the limiting factors will significantly influence, which in turn will reflect on the relevant management decision. In this regard, it is appropriate that the perception of technology is supported by the presence of

good practices in the relevant industry. In this way, the company's management will be influenced by accurate data, and on the other hand, the influence of irrelevant factors will be avoided. In support of what has been said, decision-making will be economic appropriate and not influenced by a technological wave (Sun, H., et al. 2016).

## CONCLUSION

In conclusion, it is appropriate to summarize the main reasons that put pressure on management decision-making in the context of the inclusion of the business organization in the digital era.

The influencing factors are subdivided into economic and psycho-social, as the economically ones are associated with the achievement of competitive advantages in terms of optimization of economic processes through the use of digital technologies. On the other hand, the psycho-social factors that play a role in the decision to implement technological innovations are influenced by technological and innovation waves, which are often considered irrelevant to the business organization.

The implementation of digital technologies within the company must always be economically justified and supported by qualitative quantitative and qualitative analysis.

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Assen Zlatarov University  
ANNUAL, Vol. L, BOOK 2, 2021  
SOCIAL SCIENCES

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Libra Scorp Publisher  
[www.meridian27.com](http://www.meridian27.com)

Printed in M&BM Ltd.  
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Edition of  
Assen Zlatarov University  
[www.btu.bg](http://www.btu.bg)

ISSN 2603-3976

BURGAS, 2021



ISSN 2603-3976



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