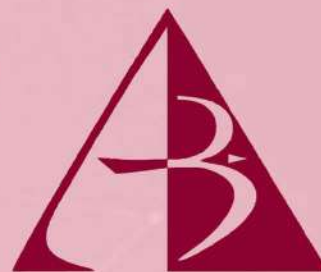


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**Burgas, Bulgaria**



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## VOLUME LI (2). CONTENTS

<i>Gita Yovcheva</i>	Prince Ferdinand – from vassal to independent ruler, the act of Tarnovo of September 22, 1908, and the annexation of the Ottoman provinces of Bosnia and Herzegovina from Austria-Hungary	7
<i>Petar Parushev</i>	The Italian attack on Greece from October 1940 – expansion of fascist aggression to the Balkans	15
<i>Petar Parushev</i>	The Italian attack on Albania in April 1939 – the beginning of fascist aggression in the Balkans	24
<i>Galina Petrova, Ivan Sokolov</i>	Constructions with optative meaning in Bulgarian: structural and semantic specificity	32
<i>Reneta Grigorova</i>	Foreign language anxiety and test anxiety among pedagogy students	38
<i>Zlatina Karadzhova</i>	Sunny Beach – destination for mass sea and/or climate and SPA tourism	41
<i>Rusen Gigov, Ivan Dimitrov</i>	SWOT analysis as a decision-making tool in the process of implement blockchain technology in Bulgarian enterprises	48
<i>Svetozar Dimitrov</i>	Basic instruments of psychodrama method as effective way of therapeutic change and personal development	53
<i>Svetozar Dimitrov</i>	Referential activity assessment components and their potential for understanding personalities with psychotic functioning	58
<i>Gergana Angelova- Popova</i>	Essence of scapular stabilization in the treatment of impingement syndrome of the shoulder joint	62
<i>Sonya Nencheva</i>	The importance of physical activity for patients with cancer	68





**PRINCE FERDINAND – FROM VASSAL TO INDEPENDENT RULER, THE ACT OF  
TURNOVO OF SEPTEMBER 22, 1908, AND THE ANNEXATION OF THE OTTOMAN  
PROVINCES OF BOSNIA AND HERZEGOVINA  
FROM AUSTRIA-HUNGARY**

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**ABSTRACT**

*The present paper aims to examine several significant moments in the history of the Principality of Bulgaria and the Balkans, namely the path of Prince Ferdinand from a vassal of the Sultan to a ruler with a royal title; the declaration of Bulgarian independence in the old capital Tarnovo and the annexation of the Ottoman provinces Bosnia and Herzegovina from Austria-Hungary in 1908. The act of annexation was preceded by the declaration of independence of the Principality of Bulgaria. Thirty years after the entry into force of the Treaty of Berlin as a guarantor of the status quo in the Balkans, it was successively violated by Sofia and Vienna. The study examines the diplomatic preparation of the act of declaring Bulgarian independence, the annexation of the Ottoman provinces of Bosnia and Herzegovina by Austria-Hungary and the first reactions and the position of the Ottoman Empire as a party in the Balkan crisis that broke out. For the needs of the research, the main scientific works on the subject and published documents were used.*

**Key words:** *Bosnian crisis 1908, independence of Bulgaria, Tarnovo, Alexander Malinov, Stefan Paprikov, Serbia, Ottoman Empire, international relations, annexation, Berlin Treaty, Austria-Hungary, Prince Ferdinand, the title of king*

**INTRODUCTION**

In 1878, the Ottoman provinces of Bosnia and Herzegovina were occupied by the Habsburg Monarchy by virtue of Art. 25 of the Treaty of Berlin. Thirty years later, in September 1908, Vienna proclaimed the annexation of the two provinces and their inclusion within the borders of Austria-Hungary, causing another crisis in the Balkan region – the Bosnian crisis. The actions of the Habsburg Monarchy and the events in Bulgaria related to the declaration of independence of the Principality from the Ottoman Empire provoked the reactions of the Sultanate government in Constantinople.

The present study aims to shed additional light on the role of the Bulgarian ruler Prince Ferdinand I in the preparation of the act of declaring Bulgarian independence, the events in the old Bulgarian capital Tarnovo and their connection with the annexation of the Balkan provinces of the Ottoman Empire Bosnia and Herzegovina by Austria-Hungary. Many articles, studies, monographs, document collections are devoted to one or another aspect of the problems considered in the research [1]. At different times and on different occasions, interest in them activates or dies down, but it never ceases. It is periodically

nourished by newly discovered documents, as well as by the appearance of new theses and interpretations of already known historical facts. The article was written using published documents, information from periodicals of the period, as well as several studies on the issue.

\* \* \*

On June 25/July 7, 1887, Prince Ferdinand Saxe-Coburg-Gotsky was elected as a Bulgarian prince. When he took over the country in August of that year, he was not recognized by any great power, including the suzerain Turkey. The first Regent of Bulgaria, and later Prime Minister, St. Stambolov, tried to stabilize the country from the inside by achieving rapprochement with the Ottoman Empire. The main reason for this was the fact that the sultan had - if not the power - then the legal authority to intervene in Bulgaria and thus possessed the key to any action. The more loyal Bulgaria was, the less inclined the Sultan was to intervene. Thus, on November 1, 1887, the Austro-Hungarian ambassador in Constantinople, von Caliche [2], reported in Vienna: "*The Sultan by no means speaks ill of Prince Ferdinand's personality, mainly he would like to be able to confirm his rule.*" [3] Austria-Hungary was interested in maintaining Ferdinand and

sought to impose his recognition by inducing Turkey to take the initiative. At Balplatz, they know that without the consent of all the great countries that signed the Treaty of Berlin, neither the Bulgarian prince nor the independence of the Principality can be officially recognized. Therefore, they use the question of Bulgarian independence only as a threat to Turkey to achieve a settlement of Ferdinand's situation. This also corresponds to Vienna's perspective on this matter. Therefore, Austro-Hungarian diplomacy began to exert pressure on the Ottoman Empire by threatening that Bulgaria would declare its independence if the Sultan, in his capacity as suzerain, did not take the initiative to settle the prince's situation. In this sense, Vienna's suggestions to Constantinople were a tactical move to ease Ferdinand's difficult situation in Bulgaria.[4] Ferdinand's arrival in Bulgaria solved the issue of finding a Bulgarian ruler, but it gave rise to a new, no less important problem - that of his recognition by the great powers and suzerain Turkey. The implacable position of Russia, which insists on the immediate expulsion of the prince, prolongs the Bulgarian crisis, and practically makes it difficult to resolve. Despite their decidedly favorable attitude towards Bulgaria, the so-called friendly countries England, Austria-Hungary and Italy cannot go outside the framework of the Berlin Treaty. Guided above all by their own interests, they advise the rulers in Sofia to "*maintain order and peace in Bulgaria*". The subsequent actions of Prince Ferdinand and Prime Minister St. Stambolov lead to a kind of "*unofficial recognition*" of the Bulgarian head of state, his first adviser and the government. They are the key moment to the future foundation of the Bulgarian dynasty in 1893 and the subsequent official recognition by the Great Powers of the Bulgarian ruler in 1896 [5] When this becomes a fact, the Bulgarian government prepares Ferdinand's solemn visit to the Sultan. The diplomatic file reveals the trickery between the Turkish and Bulgarian authorities on seemingly insignificant details, behind which, however, lies the desire for sovereign treatment of the Bulgarian monarch. In February-March 1896, our diplomatic agent in Istanbul almost daily opposed the Turkish protocol on matters related to the residence, where the prince should stay - that it should be a majestic Sultan's palace, befitting the rank of the highest guest, with the title of the Bulgarian monarch "*Royal Highness*", with the exchange of orders, etc. With firmness and ultimatums that Ferdinand would refuse the visit, the

original position of the hosts was changed significantly: from refusing to receive him with royal honors because he was a vassal, and providing an apartment for the prince, instead of a residence where any emperor or head of state, until the officially agreed primacy of Ferdinand over the grand vizier, acceptance of his birth title "Royal Highness", recognition by the sultan of the established Bulgarian orders and the title "ministers" for the members of the Bulgarian government... [6]

This was a trend in Bulgarian politics during the Eastern Crisis of 1894-1898, when the Bulgarian government tried to use Turkey's difficulties and sought to solve the following problems - making gains on the national question and even possibly declaring independence. K. Stoilov's cabinet openly started talking about declaring the independence of Bulgaria. According to the Bulgarian concepts of the time, it is understood that the independent Bulgarian state should also include Macedonia. The upcoming tenth anniversary of Ferdinand's arrival in Bulgaria is used to comment on the issue of rejecting vassalage to the Ottoman Empire. In fulfillment of these tasks, the Sofia government is taking steps in different directions. It tries to reconcile some of its demands with the Balkan countries, but their conflicting interests are also manifested there. At the same time, the Austro-Hungarian diplomatic representative in Constantinople Kaliche hinted to Exarch Joseph that Vienna wanted Bulgaria to be independent, but on condition that it had a clear foreign policy orientation. [7]

In 1907, on the twentieth anniversary of his ascension to the Bulgarian throne, Prince Ferdinand I asked the Austro-Hungarian Emperor Franz Joseph about taking steps to declare the Principality's independence from the Ottoman Empire but was warned not to rush. In the end, Austria-Hungary approved the Bulgarian line in principle, with the condition that it was agreed with Vienna. This shows that at that moment the Habsburg Monarchy had already decided to prepare the conditions for the annexation of Bosnia and Herzegovina, as another stage of its penetration into the Balkans.[8]

In the following year, 1908, in the Austro-Hungarian ruling circles, the decision to implement the idea of coordinated actions with the Bulgarian principality under suitable international conditions gradually matured. The outbreak of the Young Turk revolution in the Ottoman Empire and the successful Austro-Russian negotiations in Europe for Vienna created a favorable

situation for conducting a joint action with the aim of collectively violating the Berlin Treaty. [9] Soon after, Sofia and Vienna proceeded to realize their goals.

In addition to the revolution of the Young Turks that broke out a little earlier in August and September 1908, two events took place that further favored the realization of the Bulgarian and Austro-Hungarian plans. On August 30, the so-called "*Geshov incident*" took place in the Ottoman capital of Constantinople. The Bulgarian diplomatic representative in the Turkish capital was not invited to the gala dinner on the occasion of the Sultan's birthday. This action aims to emphasize the position of the Bulgarian diplomat as a representative of a vassal state, when for years up to this point both countries conveniently "*forgot*" to mention this lowly position. In response to the situation, the Bulgarian government recalled its diplomatic representative from Constantinople. In Sofia, they believe that this is a suitable occasion to raise the question of Bulgarian independence. This is clear from an encrypted telegram dated September 8, 1908, from A. Malinov to Prince Ferdinand, who continues to reside in Austria-Hungary. In it, the Prime Minister pointed out to the monarch that he had also informed the Minister of Foreign Affairs about this, "*so that we can vigorously raise the issue of independence*", although he does not see an option to find open encouragement anywhere but believes that a recognition "*is done a fact of the forces would not be late*" [10].

On September 5, the Bulgarian Foreign Minister St. Paprikov also sent an encrypted telegram to Prince Ferdinand informing him of the attitude of the Great Powers to the "*Geshov incident*" and the idea of declaring Bulgaria's independence. In it, he states that no action has yet been taken by Constantinople regarding the "*incident*" in question, and the publications in the foreign press are "*in our favor, except for the German official*". In Petersburg, Vienna, London, Rome considers that "*in this incident the law is on our side and Turkey should start the negotiations first*". Art. Paprikov stated that "*in this case it would be best to wait calmly and with dignity, although the general impression of the ambassadors is that Turkey will not give us satisfaction*". Most of the diplomats in Constantinople believe that Bulgaria will declare itself independent. The Russian ambassador in Constantinople, Zinoviev, is of the opinion "*that in this case Turkey will not declare war on us, but that we must be prudent and consult with the powers.*" In conclusion Art.

Paprikov points out that obviously the issue of independence is maturing and must be resolved one way or another, recommending that Ferdinand summon the Prime Minister A. Malinov to Austria-Hungary to give him final instructions. [11]

In his reply to St. Paprikov Prince Ferdinand points out: "*I fully approve of your thoughts and decisions. I will call Malinov in Vienna after the Pesth celebrations and listen to him. After that, Malinov will go to Sofia, and I will wait for the development of events here, so that my sudden return to Bulgaria is not interpreted and the decisions of the government go crazy with it.*" Accordingly, he telegraphed to A. Malinov that he was expecting him on September 12 in Vienna, after which it was necessary to return to Bulgaria due to the strained relations with Turkey. [12] One of the reasons for this is the strike that broke out on September 5-6, 1908, of the employees of the Eastern Railways, including on the territory of Bulgaria and its unfavorable development for Turkey.

In order to prevent major losses for the trade, through its representative in Sofia, the Directorate of the Eastern Railways asks the Directorate of the Bulgarian State Railways to take over the service on the lines in Bulgarian territory until the end of the strike. Already on September 6, the entire network of the Eastern Railways in Bulgaria (the sections Mustafa Pasha (now Svilengrad) - Belovo and Tarnovo - Seimen (now Simeonovgrad) - Nova Zagora - Yambol) was seized by the Bulgarian railway authorities. On September 9, the company managed to end the strike and demanded that the Bulgarian staff be withdrawn from the line. Instead, control of the Eastern Railways on Bulgarian territory was established by the government in Sofia. In response to the Porta's demands that the railroad be returned to the company, Gen. Art. Paprikov states that the matter should be settled by the company itself. This step was not agreed with the prince, who still resides in his Hungarian estate. [13]

On September 10, on the occasion of the 60th anniversary of Emperor Franz Joseph Ferdinand, he was received in the palace in Budapest as an independent ruler. This demonstration, a day after the seizure of the railways, was supposed to show the disposition of Vienna towards Bulgaria and encourage the vain monarch. On September 11, Prince Ferdinand had a confidential conversation with Foreign Minister Baron A. Erenthal about the attitude of Austria-Hungary to

Bulgarian independence. After that, the princely diplomatic agent in Vienna, Mikhail Sarafov, noted in his diary: "A. Wekerle was talking about the accession of Bosnia and Herzegovina and about Bulgarian independence according to what was decided today." Apparently, some understanding was reached at the meeting between Ferdinand and Erenthal. Having decided to annex Bosnia and Herzegovina, the Austro-Hungarian government welcomed the Bulgarian request for independence and even promised support. It is not by chance that the Hungarian Prime Minister A. Vekerle hinted to M. Sarafov that an event was coming "where they will show us their sympathies". However, there is no information about an agreement outside the framework of diplomatic conditionality. [14]

Russia diplomatically, through its foreign minister A. Izvolski to the Bulgarian diplomatic representative in London Dimitar Stanchov, states that it is in favor of a problem-free settlement of the Bulgarian question but believes that this should be done after the Austro-Hungarian annexation of Bosnia and Herzegovina. The brilliant reception of Prince Ferdinand in Budapest and the rumors of a rapprochement and agreement between the two monarchs throw Russian diplomats into a panic. Dmitry Sementovsky-Kurilo - Russian ambassador to Bulgaria (1907-1911) was instructed to declare to Prime Minister A. Malinov, who had returned from Vienna, that Russia understood the Bulgarian desire for independence and was working on the issue of its realization, but the Principality should not hurry, and to wait for the Danube Monarchy. Otherwise, it is possible to incur the wrath of the Turks and lead to a war with an unclear outcome. The same thoughts were expressed by the Deputy Foreign Minister of Russia Nikolay Charikov to Dimitar Tsokov - the Bulgarian diplomatic representative in St. Petersburg, who shared with the Russian diplomat that the government is determined in the nearest future, even within a day or two, to proclaim sovereignty. Left with the impression that the Principality was not inclined to follow the Russian recommendations, Sementovsky-Kurilo proposed to Petersburg to change tactics and unconditionally support Bulgarian independence, which was inevitable anyway, thereby strengthening Russian influence in Sofia. At the beginning of October, N. Charikov struggled to get in touch with A. Izvolsky, who was traveling around Europe, to formulate a final opinion on the matter, and the Russian diplomat in Sofia was instructed to categorically insist on

waiting: "Bulgaria should not open a crisis, because there will be no to get Russian support". Assuming the exact date of the annexation, A. Izvolski and N. Charikov accept as the most important moment that the Bulgarian action did not precede or coincide with the Austro-Hungarian one. On September 20/October 3, 1908, through Sementovsky-Kurilo, they insisted to the Bulgarian Foreign Minister St. Paprikov that nothing should be done, in exchange for which Russia would diplomatically arrange independence along with other benefits for the Principality by February 19/March 3, 1909, at the latest. [15].

In the days before the proclamation of Independence, Prince Ferdinand was in Austria-Hungary. The Bulgarian ruler resides incognito under the name Count Murani. On September 21, 1908, from Sofia, the personal secretary of the monarch, Stefan Chaprashikov, sent him a quick encrypted telegram with the notice that Austria-Hungary had already notified the French government of the upcoming annexation of Bosnia and Herzegovina. Art. Chaprashikov reports that "last night" the French diplomatic representative in Sofia, Maurice Paleologue, confided to him that the Austro-Hungarian ambassador in Paris had delivered a personal letter from Emperor Franz Joseph to the President of the French Republic, A. Fallier. It announced that Vienna would annex the two Ottoman provinces and at the same time withdraw its troops from the Novopazar Sanjak. This information was also sent to Prime Minister Alexander Malinov, who was in Ruse at the time. [16]

On September 22/October 5, 1908, in Tarnovo, Prince Ferdinand I announced Bulgarian independence and the rejection of vassalage from the Ottoman Empire, followed by the proclamation of the annexation of Bosnia and Herzegovina by Austria-Hungary on October 7, 1908. [17] The sequence of events raises suspicions of a pre-arrangement between the two countries, although there is no document explicitly proving such an agreement. [18]

On September 22, in the old capital of Tarnovo, a drummer announced to the citizens the arrival of the prince and the ministers. Then, with unimaginable speed, the rumor spread that it was from here that the independence of Bulgaria would be proclaimed. This is met with "enthusiasm and stampedes (of people), in festive dress" who throng the station. The Princess, the princely children and the Speaker of the National Assembly are expected to arrive by special train.

After a long wait at the station, at 11:00 a.m. it was reported that the Prince got off at the stop at the Trapezitsa hill and from there, together with the ministers, went to the old half-collapsed church "St. 40 Martyrs". In a very short time, the church and its courtyard were filled with people. A prayer service was offered by the Tarnovo clergy. After the singing of "Mnogaya leta", in a grave silence, Prince Ferdinand stood in front of the crowd and read the manifesto. Its end was followed by a powerful shout of "hurray" from the assembled citizens of Tarnovo. Then the student choir sang "Shumi Maritsa" and the whole surrounding area fills with a majestic effervescence of the sounds of the jubilant people. As noted by the "Priaporets" newspaper, "...*this was so majestic, so touching that when the vividly resurrected memory of the once-glorious past, when here in the same place with the crowned Bulgarian tsars, cried tears ...*".

After a greeting from Archimandrite Boyadzhiev, Ferdinand went out to the church yard, where two regiments of soldiers were being built. From there the prince, the officials, the clergy, and the people head to Tsarevets. There, in front of the "*public multitude*", the Prime Minister A. Malinov read the manifesto again, but he remained unheard amid the endless "*hooray*" of the assembled people, who welcomed the titles already for King Ferdinand. [19]

In contrast to the general enthusiasm reigning in Bulgaria, Serbia welcomed the act of declaring Bulgarian Independence with marked reserve, and after the subsequent annexation of Bosnia and Herzegovina [20], strong suspicions arose in official Belgrade that Bulgaria had allied itself with the main enemy of the Kingdom – Austria-Hungary.

On October 14, 1908, the Bulgarian diplomatic representative in Belgrade, Andrei Toshev, sent an extensive report in which he clearly characterized the reactions in the Serbian capital: "*The storm that suddenly broke out in Serbia after September 22, especially on the occasion of the annexation of Bosnia and Herzegovina, has not yet quieted down. Indeed, the violent street demonstrations have decreased, but the excitement of the spirits remains almost the same. Attacks against Austria continue on all fronts... They are launched from time to time at our address as well*". [21]

In the days after the declaration of Independence, our diplomatic representative in Vienna, M. Sarafov, was particularly active. On September 23, 1908, with an encrypted telegram to Gen.

Art. Paprikov, he reports that he met by prior arrangement with the Austro-Hungarian Foreign Minister Alois Erenthal. On it, he introduced him to the content of the telegram from St. Paprikov regarding the declaration of Independence. A. Erenthal expresses particular satisfaction with this part of the statement, which states that after the declaration of Independence, Bulgaria will assist in preserving peace in the Balkans. M. Sarafov defines this as Vienna's official response. It should be pointed out here that he also had another short conversation in which A. Erenthal shared that the proclamation of Bulgarian independence made "*an unpleasant impression not only in Turkey, but also in the West*". In this regard, the Austro-Hungarian foreign minister points out that "*the King of England has spoken too condemningly about Bulgaria*", in France the mood was not particularly favorable either. In this sense, A. Erenthal foresees "*trouble*" in the future recognition of Independence. He insisted to M. Sarafov to settle the issue with the Eastern Railways nationalized by Bulgaria, with the Bulgarian government taking the initiative and immediately starting negotiations for an agreement with the company that manages them. This step, according to the Austrian foreign minister, would have worked for a more favorable perception of the Tarnovo Act by England and France. M. Sarafov undertakes to communicate this to the Bulgarian government and to assist in the favorable resolution of the issue with the railways. [22]

Meanwhile, the Ministry of Foreign Affairs and Confessions (MIFAC) periodically sends circular telegrams instructing diplomatic representatives abroad to state that the declaration of Bulgarian independence is a completely independent act. In a telegram from Sofia to the legation in Vienna dated October 1/14, 1908. St. Paprikov recommends vigorously refuting the claims that Bulgaria has issued an ultimatum to the Great Powers for the recognition of Independence within a three-day period. Along with this, the rumors of mobilization are also denied. "*Bulgaria does not want a war with anyone - stated St. Paprikov - and is doing everything possible to avoid it [...]* The declaration [of] Independence has nothing to do with the actions of Austria". [23]

Although the Bulgarian government tries to refute each such thesis, the general opinion in Turkey is that the two events are connected. Proof of this is the materials published in the official newspaper of the Democratic Party in

Bulgaria - the newspaper "Priaporets". In its first issue, in the "Foreign Chronicle" section, it is stated that the Porte received simultaneously the announcements of the proclamation of Bulgarian independence and the accession of Bosnia and Herzegovina to Austria. It is argued that this circumstance further strengthened the belief in Ottoman public opinion that the two events were pre-arranged, and this strengthened the negative mood against Vienna and Sofia. In conclusion, it is said that the Young Turk Committee has stated that it will not at present deal with the Bosnian question but will give due attention to the act of Bulgarian independence, because it is supposed that it may cause complications for Constantinople in Macedonia. In this regard, a decision was made at a meeting of the Council of Ministers that the Ottoman government would protest through its ambassadors to the powers that had signed the Treaty of Berlin. [24]

The diplomatic settlement of Bulgarian independence and the annexation of the provinces of Bosnia and Herzegovina began in the fall of 1908 and continued in the following year, 1909. Petersburg's proposal to hold an international conference to settle these issues did not materialize. The Ottoman Empire began and conducted separate negotiations with Bulgaria and Austria-Hungary, which ended with the signing of agreements with Sofia and Vienna.

### CONCLUSION

The vassal status of the Principality of Bulgaria according to the clauses of the Berlin Treaty, which at the historical moment in question is the current international law for the Balkans, created difficulties for Bulgarian diplomacy in the implementation of the country's foreign policy. The idea of Bulgarian independence appeared immediately after the Berlin Congress, and these sentiments intensified especially after the Unification of 1885. Talks were held with the European great powers, but no result was achieved. The Democratic Party government that came to power in January 1908 with Prime Minister Alexander Malinov continued this policy and sought a way to reject vassalage. The declaration of Bulgarian independence and the titling of the monarch in Sofia with the higher title of Tsar, as well as the annexation of the Ottoman provinces of Bosnia and Herzegovina by Austria-Hungary, were basic violations of the status quo established by the decisions of the Berlin Congress of 1878. The significance of both events was de-

termined by the great breach in the Berlin system of relations imposed on the Balkans, made by the Sultan's vassal Principality of Bulgaria and the Danube Monarchy, one of the guarantees for the order of the Balkan Peninsula after the Russo-Turkish War of 1877-1878. Moreover, the plan of Austria-Hungary also received support from the country that had lost prestige in Berlin - the Russian Empire, which was looking for support for its policy in Europe.

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## THE ITALIAN ATTACK ON GREECE FROM OCTOBER 1940 – EXPANSION OF FASCIST AGGRESSION TO THE BALKANS

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### ABSTRACT

*The present paper aims to shed additional light on an important moment in the history of the Balkans in the early 1940s, namely the Italian-Greek war, with an emphasis on the events preceding the Italian invasion of Greece, its preparation, the course of the invasion and its results. Specific aspects of the relations between Hitler and Mussolini, related to the spheres of influence agreed between them in Europe and the Balkans, are touched upon. They are seen in the context of a kind of competition between Rome and Berlin for Axis supremacy, prompting Mussolini, (Ducheto) The Leader, to act aggressively against the Balkan states, which he saw as territories where Italy had complete freedom of action. The article also traces Mussolini's attempt to involve Tsar Boris III in the conflict with Greece, a policy of England that sought to maintain its influence in the region and to help Athens in the difficult situation in which Greece fell at the beginning of Italian aggression. The turn in the hostilities of the Italian-Greek front is traced, where Italy after November 1940 failed to achieve real success and waited for the start of the German operation "Marita" and the occupation of Greece and Yugoslavia by the Wehrmacht.*

*For the needs of the research, the main scientific works on the subject in Bulgarian and foreign historiography and published documents were used.*

**Key words:** *Italy, October 28, 1940, invasion of Greece, Metaxas, Hitler, Mussolini, Count Galeazzo Cano, international relations, occupation, spheres of influence, World War II, Balkan peninsula, Italian-Greek war.*

### INTRODUCTION

A few months before the start of World War II, in April 1939, almost without resistance, Albania lost its independence and became the first victim of Benito Mussolini's conquest policy in the Balkans. The country was occupied by Italian troops and its territory, in the following 1940, was used by Rome as a springboard from which to continue its aggression against another Balkan country – Greece.

It is necessary to clarify that the present study will examine the events preceding the invasion of the Italian troops in Greece and the course of military operations.

The military campaign continued for almost seven months, which was initially successful for Italy, but later it failed to achieve its goals and in a short time to maintain a victory over the Greek army. Mussolini tried to mobilize and raise the morale of the Italian troops to carry out his aggressive plans, but he did not rest. Greece was defeated only after the German intervention in the Balkans.

A large number of articles, studies, monographs are devoted to one or another aspect of the topic under consideration in the research.[1] At different times and on different occasions, interest in them is activated, and subsequently subsides, but does not stop, fueled periodically by newly discovered documents or by the appearance and launch of new theses and interpretations of already known historical facts.

Many studies, some of the achievements of Bulgarian and foreign historiography and published documents were used to write the article.

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The ruling circles in Albania's neighboring countries, Yugoslavia, and Greece, were not aware of the danger that had reached their borders and showed no signs of sympathy for the fate of their neighbor. It can be said that Albania fell victim to the "appeasement" policy of Great Britain and France before the very beginning of the great war.[2] Although in April 1939, after the occupation of Albania, Italian troops reached the Greek border, the government in Athens took

no measures to prepare and deal with the emerging danger, although the threat from Fascist Italy dates back to Italo's time - the Abyssinian War. The rulers in Athens made it clear that they saw the danger, but did not secure allies among the Balkan countries, which were also threatened by an attack by fascist Italy. [3]

The interests of the Third Reich at the moment required peace and tranquility in the Balkans. Hitler wrote to Mussolini that it was to the advantage of both Italy and Germany if "no burning torch is thrown into this area. In Berlin, they are also worried about rash actions by Italy, related to Mussolini's plans to enter Croatia. The Wehrmacht High Command insisted on countering this, as a military conflict in the Balkans would threaten the existing favorable general situation before the attack in the west and would call into question the strategy of a war on one front. In addition, the German strategy relies on peace in the Balkans at this moment, but only as part of its future "great space". However, Italy increasingly began to assert its claims against Greece and Yugoslavia. [4]

From mid-1940, Hitler's Germany began preparations for war against the Soviet Union. For its purposes, Berlin wants to use the territories, material and human resources of the countries that will enter the Tripartite Pact. Germany turns its attention to Hungary and the Balkan states. Conquering the Balkans meant securing the southern flank of the future war against the Soviet Union, and also eliminating England's last positions in that region. A number of circumstances favored Germany's penetration of the southeast. Germany's major military successes in the spring and summer of 1940 strengthened its international position. France is defeated, England - seriously weakened. Their influence in the Balkans has declined. Taking advantage of this and relying on its previous economic and political positions in the Balkans, Germany received ample opportunities for an offensive policy towards the Southeast. [5] The aggressive appetites of Italy, which also has its own interests in the region, are increasing. After entering the war against France, Mussolini told the Army Chiefs of Staff that an offensive in the east, possibly into Yugoslavia, was possible. After July 10, 1940, Duce ordered Count G. Chano to convince Hitler of the need to dismember Yugoslavia. The Führer opposed the Italian drive to disturb the peace in the Balkans in order not to provoke Russian intervention. During the negotiations between Italy and Germany in 1940, G. Chano

informed Hitler of Rome's intentions to disembark Italian troops on the Ionian Islands. In September, Italy began intensive preparations for the military campaign against Greece. [6]

In the first half of September 1940, a meeting was held in Rome between Ribbentrop and Mussolini, at which the Mediterranean Sea and the Balkans were recognized by Germany as Italy's sphere of influence. Regarding the Balkans, the Hitler government declared that Italy would conquer this region "after the end of the war" and would not harm Germany's Mediterranean and Balkan interests there. Therefore, Mussolini enviously watched Hitler's actions in the Balkan region, while at the same time preparing Italian troops for the attack on Greece are at an end.[7]

On October 10, 1940, without coordinating its actions with Italy, Germany introduced at the "request" of the government of Gen. Ion Antonescu troops into Romania and secures unilateral control over the Romanian oil fields and the Danube Delta. The conquered position is key. From Romanian territory, the Third Reich provides an opportunity to exert pressure on the Balkan states, to influence Italy and, most importantly, to counter the Soviet expansion to the south. [8]

On October 11, 1940, the German embassy in Rome informed Mussolini that, at a "Romanian request," a Reich military mission had arrived in Bucharest and the Luftwaffe had taken over the protection of the oil fields in Ploiesti. Duce sees this as a new blow to his quest to maintain relations with his German "fellow" within the framework of the partnership. His remark to G. Chano on the occasion of the Romanian "occupation", which, according to him, made a very bad impression on Italian public opinion, is not accidental: "Hitler always confronts me with some *fait accompli*. This time I will return it to him in the same coin. He will learn from the newspapers that I have occupied Greece. In this way, the balance will be restored again." [9]

Mussolini sends a note of protest to the German Foreign Office. He wanted Italian troops to be admitted to Romania, but his wish was not considered. Duce, the leader perceived Germany's unilateral actions as an effort to establish absolute dominance in Europe. Hitler's actions in Romania are the reason for the continuation of the Italian aggression in the Balkans and the targeting of the blow to Greece. In the Italian action plan against Greece, the need for Bulgaria's participation is considered for military-strategic reasons. A part of the Greek army was

stationed along the Bulgarian border, and, if Sofia remained neutral in the conflict, this army would be directed against the Italian, but if it intervened it would blockade six to eight Greek divisions. Thus, the Bulgarian position turns out to be of great importance for the course and even for the outcome of the planned military operation. At the beginning of September, Count G. Chano assured the Bulgarian Minister Plenipotentiary in Rome Karadzhev that Italy would support Bulgaria for the exit to the White Sea and stated: *"The Greek-Italian issue is completely open. The day of reckoning is yet to be determined but be ready."*

On October 15, the Duce convened the military council in the Palazzo Venezia and outlined the plan for an attack on Greece. The operation must be carried out in two stages. The first envisages the conquest of the Greek coast south of the border with Albania together with the Ionian Islands, as well as Thessaloniki, and the second a complete occupation of the country. The Duce's intentions were enthusiastically supported by the commander of the Italian army in Albania, General Sebastiano Visconti Prasca, appointed to take command of the operation, and by the royal viceroy in Tirana, Francesco Yacomoni, who reported that: *"this action is eagerly awaited in Albania and the country with filled with an enthusiasm so alive that even of late there has been a certain disappointment that she has not yet begun"*. Chief of the General Staff Marshal Pietro Badoglio and Deputy Chief of Staff of the Land Forces General Mario Rosato do not share their optimism and are skeptical about this undertaking, but their timid objections are drowned in the general euphoria. The operation must start immediately, i.e., with the forces for its first stage only, including the units in Albania. The final General Staff attack plan was completed on 20 October and called for the attack to begin on 28 October - the anniversary of Mussolini's fascist march on Rome. [10]

At this meeting, the Bulgarian role in the upcoming military operation was discussed. The Greek state, according to him, will be occupied to remain "forever" under Italian political and economic control. In this connection, Count G. Chano points out that according to the secret reports of the Italian ambassador in Athens, the Greeks hate the government of Metaxas and indicates that they will not resist the Italian army. At the meeting, Mussolini expressed to Marshal P. Badoglio the hope that Bulgaria would join the Italian action and thus engage six to eight

Greek divisions. He promises to send a personal letter to Tsar Boris III with the suggestion not to miss the "only opportunity" to realize his aspirations over Macedonia and access to the White Sea. Thus, the Bulgarian participation turns out to be at the center of the immediate preparations for the war. [11]

That Rome has its own view on the upcoming territorial changes in South-Eastern Europe is evident from the opinion expressed to the Bulgarian Minister of Agriculture, Ivan Bagryanov, during his tour of Germany and Italy in October 1940. The Italian Foreign Minister Count G. Chano stated to him, that they would be done with Greece in a few weeks. *"You," he says, "will have to use (the occasion) and immediately from your mountains ... descend to the sea. This will be the last and only opportunity to make your claim. It seems to me that Bulgaria will achieve its unification in 1940. You have to be ready!"*. [12]

On October 16, Benito Mussolini declared: *"There is a political necessity to occupy Greece."* His greatest goal is *"in the 20th century, Rome will once again become the center of Latin civilization, dominate the Mediterranean, be a beacon for all people."* Apart from being part of the imperial goals of Italy, which wanted to turn the Mediterranean Sea into an inland sea, and the Balkans had been designated as the main direction of expansion since the creation of the fascist state, the conquest of Greece was also a matter of Mussolini's dissatisfied dictatorial ambitions. [13]

On October 18, 1940, Mussolini, keeping the intentions of invading Greece a secret from Hitler, notified Tsar Boris in writing of the impending invasion and pointedly pointed out: *"Before you and before Bulgaria is presented a historic case for the realization of the old and just aspiration for an exit of the Aegean"*. Tsar Boris III sends a diplomatic reply which reads: *"Deeply moved by the idea you had of informing me of your decision, I thank you from the bottom of my heart... Due to the unfavorable circumstances which prevented and delayed the necessary arming of her army and surrounded by neighbors, whom you know well, Bulgaria must act extremely cautiously and prudently, without giving up its sacred rights and its historical mission. For these reasons, it is forced to refrain from armed action."* Flatteries and assurances cannot soften the categorical "no" to the invitation to participate in the aggression against Greece.[14] Tsar Boris' refusal of Mussolini's tempting offer to

participate in the planned venture was based both on the understanding that this was a solo adventure of Mussolini's, without Hitler's knowledge, but also on real concerns about Turkey's behavior in the created situation. [15]

Initially, the Italian General Staff developed plans to attack Yugoslavia (Esigenza "E") and Greece (Esigenza "G"). Based on the later rapprochement with Yugoslavia, it was decided to focus on a renewed plan for the occupation of Greece, considering the rapidly changing situation on the peninsula. The military council of Fascist Italy approves a new plan for a military operation against Greece (Emergenza "I"), where the basic provisions of the operational directive for the offensive are developed. For the conquest of Greece, the Italian command separates the 9th army, consisting of two army corps, which includes 8 divisions (6 infantry, tank and mountain-rifle), a separate operational group of 3 regiments, or a total of 87,000 people, 163 tanks, 686 guns. [16]

Militarily, Greece is not ready to repel external aggression. Its army is armed with small arms and equipment mostly from the period of the First World War. In Epirus and Macedonia, the Greek armed forces number 120,000. According to the mobilization plan of the Greek General Staff, 15 infantry and one cavalry division, 4 infantry brigades and the reserve of the Main Command will be deployed. The land units are mainly concentrated against Bulgaria and Albania. The Greek covering troops, permanently deployed on the Greek-Albanian border, number 2 infantry divisions, 2 infantry brigades, 13 separate infantry battalions and 6 mountain batteries. Combat equipment amounts to 20 tanks and 220 guns. [17]

The reason for this is that until the moment when the Italian threat becomes real, the General Staff of the Greek Army does not propose the necessary measures to the government and only develops options to repel an attack on Bulgaria or another Balkan country, without considering the possibility of parrying the danger on the part of Italy. Until 1939, the Greek General Staff mainly paid attention to the strengthening of the northern border (with Bulgaria), where the fortified line "Metaxas" was built. The concept is to mobilize the entire fighting-capable population of the country, so that the Greek army can effectively repel not only the Bulgarian army, but also the army of any other Balkan country. It was not until April 1939, when Fascist Italy occupied Albania, that the Metaxas government was

forced to consider the problem of dealing with the Italian danger. Gen. Alexandros Papagos wrote in this connection: *"The government had never included among the goals of our military preparations that of dealing with a war against Italy. But when in April 1939 the Italian troops occupied Albania, the question of parrying the Italian danger in the immediate or nearer future was already raised from a military point of view"*. [18]

After the occupation of Albania by the Italians, the Greek General Staff drew up the "IB" plan, i.e., "Italy-Bulgaria", providing for simultaneous defense against both countries. It contained the idea of conducting an active defense in Epirus with a gradual retreat to the line - Arachtos River - Metsovo - Aliakmon River (Bistrica) - Mount Vermion, with opportunities for further offensive actions in Western Macedonia. The defense of Epirus was developed in two variants of the plan. The first envisages accepting the battles to the very border, and the second from more withdrawn positions. In the end, the choice of option was left to the discretion of the commander of the 8th Greek Infantry Division, General Haralambos Katsimitros. [19]

Epirus was initially considered a less likely theater of war because it was assumed that the main thrust would be delivered from Korcha towards Thessalonica. But after September, the Greeks still found that the threat came from Epirus and that Bulgaria did not show aggressive intentions. In addition, the British Navy continued to successfully control the Eastern Mediterranean, so the likelihood of a possible Italian landing decreased. For these reasons, the Greek operational plans were adjusted and in October it was decided to deploy 8 infantry divisions and 2 infantry brigades on the border with Albania, and on the border with Bulgaria - 6 divisions and 1 brigade, and 1 infantry division, 1 infantry brigade and 1 cavalry division - in the sector around Thessaloniki. Smaller units were left to carry out garrison duty on the islands and larger towns. [20]

On October 28, 1940, at 2:30 in the morning, Italian Ambassador Grazi asked to wake up Gen. Metaxas and handed him an ultimatum, which had been drawn up by the Minister of Foreign Affairs, Count G. Chano, six days earlier, and which in reality did not provide Athens with "any way out". It states that: *"...due to the pro-British policy of the Greek Government, which at one time granted England the right to use Greek ports and airfields for military purposes, the*

*Government of Italy requests consent to send troops into Greece."* The response deadline is 6:00 am. [21]

At 5:30 a.m., without waiting for an answer to the ultimatum, the Italian troops deployed on the southern Albanian border invaded Greek territory. After intense artillery preparation, the forces of the 9th Italian Army began an advance from Gramos to the coast of the Ionian Sea and, crossing the Greek-Albanian border, invaded Greek territory. Greek border units resisted the invasion, but despite their heroic defense, Italian troops broke through their defenses on a 50-kilometer stretch and penetrated into Greek Epirus and Macedonia. Developing the success and moving to the south, they delivered the main blow in the direction of Ioannina, as well as the strategically important village of Metsovo, where the only highway connecting Epirus with Macedonia passes. [22] In the initial Italian attack, weather conditions did not favor the use of aviation. Due to the difficulties encountered in the ground operation at the very beginning, they forced the command of the Italian air group to immediately take advantage of the afternoon break in the clouds. Airborne bomber squadrons strike the lines of communication supplying the Greek troops. The first aerial collisions between Greek and Italian planes were also reached. [23]

The Italian invasion was discussed at a meeting of the Greek Council of Ministers, where Prime Minister Iohannis Metaxas declared that *"the war the nation is starting today is only a war of honor."* The reason is that the Italian forces have complete superiority in numbers, a significant advantage in arms and firepower, and their dominance in the air is absolute. That is why Mussolini was confident that his march would be an impressive display of *"blitzkrieg"*. [24] He did not heed the warnings of senior officers about the state of the field, the lack of roads, maps, etc. His initial intoxication was most vividly shown in his telegram to Hitler dated 11:00 on October 28, 1940, where on German recorded: *"Fuhrer, we march!"* [25]

During the first days of operations, advancing along the entire front, the Italians achieved some success. In the central region of Epirus, they move towards Kalpaki - the main direction of the advance. They force the Kalamas River in the region of Thesprotia (Chamurya) and advance to the south, and the Greek units occupy the defense of the Acheron River. In the region of Pindus, the Italian Alpine Division "Julia" advanced with the task of capturing Metsovo and severing

the connections of Epirus with Thessaly and Macedonia. On November 2, the Italians captured Samarina, and on November 3, they entered Bonus. Metsovo is only 25 km away, and if it falls into the hands of the enemy, the region of Epirus will be cut off from Thessaly and Macedonia. In Northwestern Macedonia, the Italian troops managed to capture only a few Greek posts and control a few heights. With their defensive fighting, day after day, the Greek units exhausted and inflicted serious losses on the Italian divisions, gaining valuable time needed for the arrival of Greek reinforcements in this section of the front. This happened after almost 15 days of bloody fighting, when the superiority of the Greek forces was gradually achieved. On November 8, the Italian offensive was gradually halted along the entire front. In the Pind Mountains, the Julia Division was almost defeated. On the same day, its commander, General Mario Girotti, was forced to give the order to retreat, which meant that the *"Battle of Pindus"* ended in defeat for the Italians. [26]

The defensive stage of the war for the Greeks, which lasted from 28.X. until 13. XI. 1940, ends. The Greek army takes the military initiative. The balance of power changed radically in her favor, and she now had 70 battalions on the Albanian front against 40 Italian ones. Parts of the army of General V. Prask are threatened by encirclement and their general retreat begins in a severe winter and with complete impassability in the Greek mountains. They are exhausted and the Greek army has a real possibility of their final defeat. [27]

In mid-November 1940, it became clear that Italy was unable to cope with the Greek resistance alone. On November 18, Hitler held a conference with the Italian foreign minister, Count G. Chano, in Obersalzberg. On it, Hitler commented on the negative consequences of the Italian attack on Greece, emphasizing the need for military aid from the German side as the only way out of the situation. According to him, this help is only possible in the spring and after a series of previous actions, the most important of which are the inclusion of Bulgaria and Yugoslavia in the Tripartite Pact and ensuring Turkish neutrality. [28]

Meanwhile, the main attack of the Greek troops in the second half of November 1940 began to take place in the sector of the "Western Macedonia" army (General Iohannis Pizzicas) against Korcha with the forces of its 3rd corps (Georgios Çolakoğlu) and 2nd corps (Dimitrios

Papadopoulos). Their advance was supported by the 1st Corps (General Paiaiotis Demestichas), which advanced on their left flank in the direction of Gyrokastra. The Greek units successfully cross the Morava Mountain massif and begin operations to encircle Korcha. Falling into a critical position, the Italian 9th Army began a retreat and withdrew from the city. On November 22, the 9th Greek Infantry Division (General Christos Zigouris) entered Korcha. The Greeks won victories in all other sections of the front as well, pushing Italian units deep into Albanian territory all along the border. Important cities such as Permet, Girokastra and Saranda, Pogradec and Himra fall into Greek hands. The Italians manage to hold positions in the area around Klisura-Tepeleni. [29]

By the end of the year, they only managed to stabilize the front along the Pogradec-Tepeleni line. Albanian participation in the Italo-Greek war itself was quite limited. Mussolini intended to assign two Albanian battalions to each Italian division during the war in Greece. But the actual results in this regard are not very encouraging. Three battalions of the Albanian fascist militia were also formed, two of which took part in the fighting around Korcha. They did not show high morale and military qualities and left their positions, allowing the Greeks to conquer the city. Obviously, the Albanians are not enthusiastic about the Italian promises, fueling their irredentism towards Kosovo and Chamurya and defined by G. Cano as an ideal spiritual motive that should keep the *"Albanian national spirit high and united"*. [30]

The Greek land offensive is a success. The Greek troops managed to break through the Italian defenses and not only reached the state border, but also penetrated deep into Albanian territory. The Greek aviation has difficulties in covering the advancing ground troops from the air and their immediate support. At the same time, the Italian Air Force organized the first air raid on Athens.

At the beginning of 1941, the situation on the Greek-Italian front, regardless of constant additions with fresh units, compounds, and new combat equipment, became increasingly unfavorable for the Italian troops. The aviation group of the Italian Air Force, concentrated on the Albanian front and recruited for combat operations there from the southern part of the metropolis, failed to fulfill its tasks.

Despite its numerical superiority and the considerable combat experience of much of the air

force of the Italian Air Force, air superiority was not achieved. It was the weak air support of the own troops and the unsatisfactory impact on the tactical and operational reserves of the Greek army that allowed it to successfully conduct a counter-offensive operation, which led to the capture of 25% of the territory of Albania and the passage of some strategic objects under Greek control. [31]

Seeing that the winter was passing without having achieved his goal, Mussolini raised the slogan: *"Spring is ours!" Believe, obey, fight!"* Hitler, hurrying to the East, wants a meeting with Mussolini. It took place on January 18, 1941, in Salzburg. To her, Duce asked the Führer to give him the opportunity to strike *"the first blow against Greece"*. After his return from Salzburg, i.e., after January 20, Mussolini devoted all his energies to the preparation of the spring offensive. He sends 10 more divisions to Albania. The Italian headquarters withdrew fighters and bombers from the other fronts and sent them to the Albanian front. Mussolini himself arrived in Tirana on March 2, 1941, and immediately left for the front. He inspected its central section at Klisura, where 12 divisions, one of which was armored, reinforced with battalions of Black-Croatian, Grenadier and Bersaliers with over 130 guns and supported by 500 aircraft were preparing to advance on a front of 25 km against 6 Greek divisions. On March 9, 1941, Mussolini gave the order to begin the spring offensive of the Italian army. The Italian troops with the support of artillery and aviation carried out from 5 to 10 attacks per day, but all of them were repulsed by the Greek units and gave no result. On March 14, General Gellozzo reported the following to Mussolini about the state of the troops at the front: *"Our army has been fighting for months without seeing the end of the campaign anywhere. In essence, we did not achieve any impressive victory to lift the spirits of our weary soldiers. Our only success is negative. We only managed to stop the Greek advance."* [32]

The Italians failed to achieve any advantage and thus waited for the German military operation *"Marita"* which began on April 6, 1941. Six well-equipped German divisions, after three days of hard fighting, managed to break through the line of Greek fortifications. The appearance of German units in the rear of the defending Greek troops and the capture of the city of Thessaloniki - on April 9 - forced the Greek army operating in the north-eastern part of the country to capitulate. Greek troops fighting in the area of the Greek-

Albanian border also found themselves under threat of encirclement and the command issued an order to withdraw to the south. As a result of the further movement of the Italo-German troops, the main forces of the Greek army in the northwestern part of the country were isolated and on April 20 they laid down their arms. The English Expeditionary Force begins to retreat to the Peloponnese peninsula. [33]

As a result of the successfully conducted military campaign by the Wehrmacht in the period April - May 1941, at the beginning of June, all of Greece was under triple German, Italian and Bulgarian occupation. The Germans occupied Athens and Thessaloniki, Crete, and several Aegean islands. Bulgaria receives permission to seize Western Thrace and parts of Macedonia. The Italians control the rest of the country. [34]

### CONCLUSION

After the occupation of Albania, the conquering aspirations of B. Mussolini were directed in the direction of Italy's neighbor Greece. Despite clear indications of Rome's aggressive intentions, until mid-1939, the rulers in Athens took no steps to fortify the Albanian-Greek border and prepare the army to repel a possible Italian attack. Propaganda in Greece up to this point only talked about the "*danger from the north*", i.e., from Bulgaria. In the early autumn of 1940, Germany recognized Italy as a sphere of influence in the Mediterranean Sea and the Balkans. That is why Mussolini took Hitler's decision to send troops to Romania without consulting him particularly hard. This served as an occasion for the Duce to launch the operation against Greece, which had been prepared for a long time and should be a successful blitzkrieg of the Italian army. At first it achieved rapid success, but gradually the Greek troops took the initiative and stopped the Italian advance. For seven months, the Italian war machine failed to achieve success against the heroically defending Greek troops, even after Mussolini came to the Italo-Greek front and prepared the spring offensive of Italian units in 1941. It did not lead to any success and change in the positions of the warring parties, but only managed to limit the offensive actions of the Greek army. This confirms the fact that Italy could not deal with Greece alone and had to wait for help from Germany and the implementation of Operation "*Marita*" by the Wehrmacht in April 1941, after which the Greek army laid

down its arms, German troops entered Athens and the country was subdued.

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## THE ITALIAN ATTACK ON ALBANIA IN APRIL 1939 – THE BEGINNING OF FASCIST AGGRESSION IN THE BALKANS

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### ABSTRACT

*This paper aims to shed additional light on several significant moments in the history of the Balkans at the end of the 1930s, namely the events preceding the Italian invasion of Albania, its preparation, the course of the invasion and its results. The relationship between Hitler and Mussolini, the spheres of influence agreed between them in Europe and the Balkans, in the context of a kind of competition between Rome and Berlin, pushing the Ducheto (nickname for Benito Mussolini) to aggressive actions against the Balkan states, which he sees as territories where Italy has complete freedom of action. The article also traces the diplomatic moves and policy of the major European countries – England, France, and the USSR, which should be a guarantor of the security of the Balkans, but their interests at this moment lead to the encouragement of the aggressive intentions of Germany and Italy. For the needs of the research, the main scientific works on the subject in Bulgarian and foreign historiography and published documents were used.*

**Key words:** *Italy, 1939, invasion of Albania, Tirana, Hitler, Mussolini, King Ahmed Zogu, Count Galeazzo Chano, international relations, annexation, spheres of influence, World War II, Balkan Peninsula*

### INTRODUCTION

Albania lost its independence a few months before the start of the Second World War and became the first victim of fascist aggression in Europe and the conquest policy of Benito Mussolini. The next Italian strike is aimed at Greece. It is necessary to clarify that the present study will examine the events preceding the invasion of the Italian troops in Albania, the course of the military campaign and its result.

A large number of articles, studies, monographs are dedicated to one or another aspect of the problem considered in the research.[1] At different times and on different occasions, interest in them is activated, and subsequently subsides, but does not stop, fueled periodically by newly discovered documents or by the appearance and launch of new theses and interpretations of already known historical facts.

Many studies, some of the achievements of foreign and Bulgarian historiography and published documents were used to write the article.

\* \* \*

The strengthening of German political and economic penetration in Central and South-Eastern Europe and the absorption of Austria. means in practice shifting the borders of the

Reich directly to the Balkans. Hitler's successes made his ally Mussolini jealous and hurt. To compensate somewhat for the German gains, he began to think how to achieve successes of a similar kind. For these reasons, the gaze of the Italian Fascist leadership turned to Albania, seen more as an Italian overseas protectorate. [2]

Despite common goals and mutual support in the international arena, a sincere alliance between Germany and Italy was not established. German expansion in the East and South-East caused anxiety in Rome, which had difficulty coming to terms with its secondary role in the Axis. After the Anschluss of Austria, mistrust of Germany among ruling circles in Italy grew, due to fears that the Third Reich would direct its expansion to the Adriatic. On this occasion, in April 1938, the Yugoslav minister plenipotentiary in Rome, B. Ristich, reported to the Yugoslav Prime Minister, Milan Stojadinovich, that Mussolini was very worried about a possible German expansion in the direction of the Adriatic Sea. [3]

German-Italian contradictions also arose regarding Yugoslavia. Berlin seeks to make it a base for its expansion in the Balkans, as well as to play the role of the first and only arbiter in solving Central European problems, and Rome tries to win Belgrade over to its side, making

efforts to save its few remaining positions in the Danube region and the Balkans, striving to direct Hitler's aggression to the north of its interests. That is why the desire of the Italian foreign policy is for an alliance with Yugoslavia, not only because of the possibility of a possible common defense, but also as a guarantee that Belgrade will not be completely tied to Berlin.[4]

The USSR also does not lose sight of the Balkans, because it considers them as an area for its security. After Hitler came to power, Moscow's policy towards this region differed from that towards the countries of Central and Eastern Europe. If the interest in the latter is reduced to improving relations with them, then in the Balkan countries - the aspiration is to prevent their involvement in the orbit of German politics. Stalin was especially excited about Bulgaria, Turkey, and Yugoslavia. [5]

On April 16, 1938, a treaty was concluded between England and Italy to preserve the status quo. England recognized the Italian Empire, i.e., the accession of Ethiopia to Italy, and supported Italian policy in Spain. This was a great success for Mussolini, and the opposition in England criticized Neville Chamberlain's government. With the signed agreement, the Anglo-Italian tension in the Mediterranean was liquidated and an opportunity was provided not only for Italy, but also for England to focus its efforts on preventing a possible German advance towards the Balkans and the Eastern Mediterranean. [6]

Italy has been offered the role of a *"big and friendly country"* with an advantage in the Balkan Peninsula. On the eve of the war, the English government did everything possible to prevent Italy from joining Germany. British and French armed forces abroad were ordered to be careful not to provoke Mussolini with their actions. [7]

In May 1938, at a meeting in Rome, Mussolini granted Hitler complete freedom of action against Czechoslovakia and Eastern Europe with the express stipulation that Hungary and Romania would be in the sphere of predominant German influence, and Yugoslavia and Bulgaria - under Italian influence. At the same time, in the spring of 1938, Italian diplomacy developed two projects for the construction of military-political blocs. The first envisages the creation of the Rome-Belgrade - Budapest - Bucharest - Warsaw grouping, with an anti-Soviet orientation, parallel to the Rome-Berlin axis, and the second an Italian-Balkan block, including Italy, Yugoslavia, Hungary, Bulgaria, and Albania. Unlike the first project, which aims to strengthen the

balance in Italy's relations with Germany, the second is entirely and unequivocally subordinated to the idea of protecting Italy and the Balkans from German aggression. It was conceived outside the framework of the Rome-Berlin axis. [8]

The same idea is subordinated to the strategic military and political move that Italian Foreign Minister G. Chano proposed after his first visit to Tirana, namely the annexation of Albania. According to him, in this way only Italy could oppose the increased prestige of the German Reich. Albanian history researcher Miranda Vickers believes that G. Chano misinterpreted the existing sentiment in Albanian society against King Ahmed Zogu and believed it to be pro-Italian. [9]

G. Chano propagated another idea of his to Mussolini, involving the division of Albania between Italy and Yugoslavia. By beginning the preparations for the aggression against Albania, Rome feared possible diplomatic complications, as this would disrupt the status quo in the Balkans and create a new order. In this situation, Mussolini was confident of the non-interference of France, England, and Greece, but expressed concern about the position of Yugoslavia. He instructed G. Chano to talk to Stojadinovich, the Yugoslav Prime Minister, and to offer Belgrade - the Greek Thessaloniki and *"some adjustment of the border with Albania"* as compensation for agreeing to the Italian occupation. [10]

A key point in the negotiations of G. Chano with the Yugoslav prime minister is the Italian proposal for the partition of Albania, which both Rome and Belgrade are trying to hide from Germany. In a conversation with M. Stojadinovich, G. Chano outlines the possible benefits that Yugoslavia will derive from this undertaking. These are the demilitarization of the border with Albania, territorial acquisitions, and the elimination of the *"Albanian national center that is constantly stirring up unrest in Kosovo"*. When discussing the foreign-political aspects of the liquidation of Albania, attention is paid to the possible reactions of the great powers. In this regard M. Stojadinovich has certain concerns, but in the end, he states, *"...that if Germany has no objections...then the operation will be relatively light."* And despite his initial reticence, he is leaning towards the participation of Yugoslavia in this plan. G. Chano attaches great importance to its realization and points out: *"The main thing for us is the final occupation, first of all, of a strategic position on the Balkan Peninsula"*. The Italian foreign minister proposes to conclude a military alliance between Yugoslavia and Italy even after

the occupation of Albania, "...which will at this point be made possible and justified in relation to Germany, by the fact that Italy will also become a Balkan state".[11]

Subsequently, a number of developments were made, in the form of reports, to solve the Albanian question, which were prepared by two high-ranking diplomats - Ivan Vukotich and the future Nobel laureate for literature, and at that time Deputy Minister of Foreign Affairs Ivo Andrich. During the conversations of G. Chano with Prince Pavel and M. Stojadinovich at the end of January 1939, the terms of the bilateral agreement were specified. Negotiations broke down in February 1939 when Regent Prince Pavel dismissed the prime minister and remarked: "We already have so many Albanians on our territory, and they give us so much trouble that we have no desire to increase their numbers." "With the departure of Stojadinovič," writes Cano, "the Yugoslav card loses 90% of its importance... Because of this, the job will not be done with Yugoslavia, but without it, it is even possible to be against it," and Belgrade is excluded from Italian plans for Albania. At the same time the Italian diplomat in Tirana, Francesco Giacomoni, received instructions from the Ministry of Foreign Affairs recommending that guarantees be given to King A. Zogu and "to muddy the waters to prevent our true intentions from being revealed." [12]

Mussolini contemplated Italian aggression against Albania for a whole year. He is determined to see it through, even if it precipitates a major European war. Also, Albania, which is said to be fully independent - is effectively already an Italian province, with its economy and military largely under Italian control. For this reason, one of the stated theses is that this war is completely unnecessary. Mussolini was misled that Albania was a potentially rich country with room for several million Italian settlers. Furthermore, he believed that if the Albanian leaders were bribed, the Italian invasion would not meet serious resistance. The military operation against Albania was discussed at the General Staff of the Italian Army at the beginning of February 1939. The time of attack was fixed - the week after Easter - between April 1 and 19, 1939, but then Mussolini still had some hesitation. In mid-March of this year, he made the final decision on the attack. [13]

On March 23, 1939, Count G. Chano wrote in his diary that Duce decided to act more quickly on the Albanian question and drew up a draft

agreement himself. According to the Italian foreign minister, "...it is very short and consists of three dry clauses which give it more the character of an armistice than of an international pact". Mr. Cano also points out that he is also drafting an agreement which, "though dressed in polite terms, will allow us to carry out the annexation of Albania." He points out that Mussolini has approved it, and discussions of the plan of action in Albania continue the next day. The two come to the conclusion that it is not advisable to send an ultimatum immediately, but it is good to start negotiations with King A. Zogu. G. Chano indicated that if the Albanian ruler tried to resist, Italy would use force, but Mussolini was concerned about the reaction in Belgrade, which had to be kept to a minimum. [14]

On March 25, 1939, Mussolini sent an ultimatum to King A. Zogu demanding the establishment of an official Italian protectorate over Albania and the right to maintain an Italian military garrison in the country. Its acceptance would mean the end of Albanian sovereignty. Count G. Chano described the ultimatum as an agreement "which, though couched in polite terms, would enable Italy to obtain the annexation of Albania." He points out that the Albanian ruler will either accept the conditions that have been put to him, or Italy will launch a military attack on his country. For this purpose, the Italian mobilization has already begun. [15]

Mussolini relished the prospect of another war, especially against such a weak opponent. However, he is experiencing an anxious moment when the Albanian government shows signs of surrendering without a fight, and the thought is in his mind that he must copy Hitler with successful military actions. When the world public expressed concern about his aggressive intentions against a member of the League of Nations, he declared that his troops were going there to "restore order and legality" and had no intention of harming Albanian independence. [16]

In his memoirs, Sir Whiston Churchill wrote that on March 26, 1939, Mussolini made a speech defending Italian claims against France in the Mediterranean. The English Prime Minister believed that the Duce had planned the expansion of Italian influence in the Balkans and the Adriatic to balance the German advance in Central Europe, and his plans for an invasion of Albania were by this time already in place. W. Churchill concluded that just as Czechoslovakia was used as a base for aggression against Poland, so Albania would become a springboard for Ital-

ian actions against Greece and for the neutralization of Yugoslavia. [17]

In the first phase of the war, Germany did not want to expand the military operations in the Balkans, but sought to strengthen its economic and political positions, to neutralize the attempts of England and France to involve the Balkan countries in the war on their side. German policy is dictated by Germany's interest in fighting the war on one front and not wasting its forces. The Balkans, as an important raw material and food source, should remain neutral as long as it is profitable for German interests [18], and Italy sees there a field for its expansion. Mussolini watched with concern the growing Hitlerite influence in the region, where Berlin had officially recognized the prevailing Italian interests. According to the agreements between the two countries, the Italian sphere of influence included the Eastern Mediterranean and part of Africa. [19]

Thus, on the eve of the Second World War, there was a certain agreement between Berlin and Rome to divide the spheres of influence - the Balkans and the Mediterranean fell into the Italian zone of Italian interests, but Hitler and Mussolini did not reach agreement on the main issues of international development and military strategy. While in Germany they were preparing the "Barbarossa" plan for an attack on the USSR and sought to bring the Balkans in a "peaceful" way into the sphere of German interests, Mussolini was trying to act independently by expanding Italian expansion. [20]

The date of the Italian aggression against Albania was determined by two events of pan-European scale, which accelerated the launching of the military operation. The first is the end of the civil war in Spain, in which Fascist Italy was actively involved and helped to defeat the nationalist forces of General F. Franco. The second event was the German occupation of Czechoslovakia in mid-March 1939, which, besides being carried out without B. Mussolini's knowledge, finally put an end to Italian ambitions for influence in Central Europe. Therefore, the Italian dictator and his foreign minister, Count G. Chano, are determined to take revenge and strengthen the shaken Italian prestige. [21]

On March 28, 1939, Count Chano recorded in his diary that Madrid had fallen, along with the capital and all the other cities of red Spain, and this represented another huge victory for fascism. Demonstrations are held on this occasion in Piazza Venezia. The same day, Mussolini stated to G. Chano, pointing in the atlas open to the page

with the map of Spain: "*I have been like this open for nearly three years, but now that is enough. Now I will have to open it on another page*". On this occasion, Chano wrote "... *Duce ( Mussolini ) is already thinking about Albania*". [22]

On March 29, 1939, G. Chano held two meetings with Mussolini in order to prepare the invasion of Albania. On them the two decide: 1) The army, navy, and air force to continue their preparations. To be ready on Saturday. 2) Giacomoni must exert diplomatic pressure on the king (A. Zogu) by announcing the result. 3) At some point, if he does not give in before then, we will send our steamers into Albanian territorial waters and present him with an ultimatum. 4) If he still insists on refusing, we will raise a rebellion among the tribes, publish our declaration and make a landing. 5) After we capture Tirana, we will gather the Albanian leaders in a constituent assembly chaired by me (G. Chano) and offer the Albanian crown to the Italian king. [23]

From the end of March 1939, an intensive exchange of letters began between Rome and Tirana, in which plans for a new Italo-Albanian union were discussed. The Secretary of the Cabinet of the Minister of Foreign Affairs, Baron Carlo de Ferraris, arrives in the Albanian capital with a draft treaty, the purpose of which is to establish an Italian protectorate over Albania. The Italian government insists on the introduction of its troops into Albania, on the right to free use of airports, ports, highways, on the abolition of customs and currency restrictions, on the appointment of Italian general secretaries in all Albanian ministries. [24]

King A. Zogu dragged out the negotiations, presenting counterproposals that were rejected by Rome. Mussolini, in an ultimatum, wants the king to agree to all Italian conditions. "*Let Zogu consider what proofs of my friendship he has received during the last thirteen years*", he instructed F. Giacomoni. "*I would like to continue to follow this line of conduct. But if this is deemed unacceptable, then King Zogu and the Albanian people will pay the consequences.*" [25]

Meanwhile, on April 1, 1939, a large anti-Italian demonstration took place in Tirana. King A. Zogu did not respond to Mussolini's ultimatum. On April 7, Good Friday, at 4:30 a.m., the Italian army, numbering nearly 40,000 soldiers, under the command of Gen. Alfredo Hudsoni, began landing in the ports of Shengen, Durres, Vlora, and Saranda. Mr. Chano personally familiarized himself with the situation after inspecting

flight over the landing zone near Durrës early in the morning. *"Mirror sea. Green valleys and mountains - high and majestic, covered with snow crowns"* - so inspired, he wrote impressions of what he saw on the pages of his diary. The Albanians put up little resistance. Their main forces are stationed in the Kruja region with the task of defending Tirana. A. Zogu attempts to negotiate with the Italians turned out to be fruitless. Then the king decides to leave the country and seek salvation in Greece. After that, G. Chano wrote in his diary: *"...with the news of Zogu's escape to Greece, all our fears of resistance disappear..."*[26]

There are reports in the foreign press that the Italo-Albanian conflict has escalated into an armed conflict. Both sides officially deny it. When, under pressure from the British public, concerned about the threat of an outbreak of aggression in the Balkans, the ambassador in Rome, Lord Perth, approached G. Ciano with an official inquiry about Italy's intentions, the minister replied that *"...it is not about occupation, but about protection of Italian interests in Albania while maintaining the status quo and without prejudice to its sovereignty."* This allowed N. Chamberlain to make a statement in the House of Commons on 6 April that Britain had no direct interest in Albania but expressed concern, fearing of a threat to peace. Mussolini immediately sent a telegram to N. Chamberlain, in which he stated that *"the solution of the Italo-Albanian problem will be carried out in a form that will not cause a crisis either in Anglo-Italian relations or in the international situation in general."* France, unlike the British, did not even take diplomatic action. For Paris, the development of Italian aggression in the Albanian direction helped to postpone for a while the threat to France and its colonies. On April 7, in a conversation with the British ambassador in Paris, E. Phipps, French Foreign Minister J. Bonnet noted that his country had been notified in advance of Mussolini's intentions but had never intended to defend Albania by force of arms. Yugoslavian diplomacy showed the greatest interest and concern for Italian actions. Belgrade, through its ambassador in Rome, B. Hristich, repeatedly tried to obtain information through official lines, but invariably received assurances that nothing would be done against Albania that could harm the interests of Yugoslavia. [27]

The Italian attack on Albania in April 1939 was facilitated by some specific features in the political and economic structure characteristic of

the Albanian state in the interwar period. This is a time marked by sharp political struggles, political instability, an unresolved national question, the beginning of the one-man rule of King Ahmed Zogu, the military unpreparedness of the Albanian armed forces, questioning the possibility that the country alone can cope with the defense of its national borders, as well as a backward economy, complete with complete economic dependence on Rome, completely limiting the sovereignty of Tirana. [28]

On the occasion of Mussolini's actions against Albania, Hitler declared that *"Italy now holds a fortress which would inexorably dominate the Balkans."* Although the Italian conquest of Albania was declared complete, there continued to be sporadic fighting in the mountainous regions, and it is unclear whether Italian forces were ever able to penetrate the mountainous regions of the north. Mussolini preferred to limit the occupation to coastal areas and the main cities. [29]

The military operation against Albania caused great damage to Italy internationally, as it gave a kind of proof that the Duce did not respect international treaties and the independence of weaker countries. At the League of Nations, Italy argued that its troops were in Albania to "restore order and legality and not prejudice its interests". On the other hand, Mussolini, quite in his style, declared *"that he was certainly glad to be again the object of fear and antipathy,"* and the Italians had already proved that they were destined to rule over others. [30]

Arriving in Tirana on April 8, 1939, G. Chano began "political maneuvers", as he himself called the series of measures to legalize the occupation. An interim administrative committee was established, headed by former court minister Jaffer Yupi. The committee issued a proclamation to the Albanian people stating that 26 years of existence as an independent state proved the Albanians' inability to self-govern. The committee calls for the Italian army, which is in Albania *"as a friend"*, to be received favorably. [31]

Albania ceases to exist as a sovereign independent nation-state. In the first days of the occupation, an Albanian government was formed, which was essentially only a "Provisional Administrative Council" and an auxiliary body of the Italian Viceroy in Tirana. All international functions of the Albanian state are taken over by Mussolini's government, all state activity of Albania is concentrated in Rome.

Parallel to the political measures, a real economic, military and ideological invasion of Italy was taking place in Albania. Many industrial and financial groups opened their branches on Albanian territory, after which the exploitation of the country's natural resources intensified. A merger of customs services takes place, the Italian lira is introduced into circulation, an "Albanian" fascist party is created, political and "cultural" organizations arise that attack the national feelings of the Albanian people and instill a fascist ideology in the country. [32]

On April 12, 1939, the Albanian Constitutional Assembly was convened, which, under Italian dictation, declared the end of A. Zogu's regime, suspended the constitution and "*expressing the unanimous will of the Albanian people, aiming at national revival and as a solemn vow for the realization of this decided to provide in the form of a personal union, the crown of H.H. Victor Emmanuel III, King of Italy and Emperor of Ethiopia*". The created puppet government was headed by the large Albanian landowner and opponent of A. Zogu - Shefket Verlyatsi. On April 16, an Albanian delegation led by him, in a pre-arranged ceremony, presented the Italian King Victor Emmanuel III with the crown of Skanderbeg. [33]

The procedure for the liquidation of Albanian independence was completed with the appointment of the former Italian ambassador in Tirana, F. Giacomoni, as royal deputy in the country and with the adoption of a new constitution drawn up by the Italians entirely based on fascist principles. It provides for the form of government to be a constitutional monarchy, with the throne being hereditary, according to the Salic law of the dynasty of Victor Emmanuel III (item I, art. 1). Legislative power is exercised by the king, in cooperation with the supreme fascist corporate council (Ch. I, art. 5). Executive power also belongs to the king (Ch. I, art. 6). He appoints his deputy (lieutenant general) to exercise local authority on his behalf (chap. II, art. 12). The king is designated as the supreme head of the state - he commands the armed forces, declares war, concludes peace and international treaties, notifying the Supreme Fascist Council (chap. II, art. 13). The Supreme Fascist Corporate Council itself consists of the members of the Central Council of the Albanian Fascist Party and the actual members of the Central Council of Corporate Economy (Ch. IV, Art. 26). In practice, however, the government of the country is in the hands of the viceroy and the top political and military leader-

ship, who completely ignore the king, who has more representative functions. [34]

Italy takes full control of the Albanian Ministry of Foreign Affairs, Armed Forces and Gendarmerie. In this way, Albania legally and de facto became an overseas province of Rome and at the same time became a raw material appendage and a starting point for a future aggression against the neighboring Balkan countries. The only things that remain to remind us of the independence taken away are the flag, the language, and the right to print postage stamps. [35]

The annexation of Albania turned out to be a disappointment to everyone except Cano and the speculators, because it cost a lot of money and the economic potential of the conquered country was negligible. The Germans were not impressed either, though they sent official congratulations, but they feared that Mussolini was trying to restore internal balance to the Axis through rapid military successes for which he was not strong enough. These fears proved to be true, as Duce immediately began making plans, using his new Albanian base to prepare a future attack on Greece and Yugoslavia. [36]

## CONCLUSION

After the Anschluss of Austria in 1938, German political and economic penetration in Central and South-Eastern Europe expanded and this caused Mussolini's jealousy of the successes of his Axis ally - Hitler. The Duce believed that Italy would be able to counter the increased prestige of the German Reich and restore the balance in the union by effecting the annexation of Albania. In Rome, they also fear the possibility that Hitler will expand German expansion and direct it to the territory of the Balkans and the Adriatic region, especially to Yugoslavia and Albania, where Italy has traditional political and economic interests. For more than a year, Mussolini prepared the plan to invade Albanian territory. Initially, for its implementation, G. Chano sought support from Belgrade, but in the end, due to internal political changes in Yugoslavia, joint actions from both sides against Albania were not reached and Italy gave up the projected union. The Italian attack was preceded by bilateral meetings and talks between representatives of the Italian and Albanian sides, which ended without any agreements being reached. The Italian demands made were not fulfilled by Tirana. King A. Zogu did not accept the Italian ultimatum sent to her. Immediately afterwards, Mussolini gave

the order to attack Albania. With superior military forces, the Italians crushed the Albanian resistance, in a few days established control over the country and proceeded with political and administrative changes to confirm the annexation of the Albanian territories. The Italian aggression was not approved by the international community and by the great Western democracies - Great Britain and France, but they did not take any action to protect Albanian independence. Germany, for its part, while congratulating its ally, feared that Mussolini, spurred on by this easy military success, would take aggressive action against other countries without having the necessary resources to do so. This became a fact when Italy, confident in its power, invaded Greece on October 28, 1940, and started a new conflict in the Balkans.

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## CONSTRUCTIONS WITH OPTATIVE MEANING IN BULGARIAN: STRUCTURAL AND SEMANTIC SPECIFICITY

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### ABSTRACT

*The paper studies monoclausal constructions with optative meaning in Bulgarian of the type спя ми се 'I feel like sleeping', пие ми се кафе 'I feel like drinking coffee', and не ми се ходи на кино 'I don't feel like going to the cinema'. What is specific for them is that they express a desire (or lack of it) for something and the desire is provoked by an internal, subjective need. Similar constructions appear in all Slavic languages. Their distinctive feature is that the object of the desire is expressed with a dative constituent and the modal component is implicit. The aim of this work is to present the Bulgarian structural model and semantic specificity of the constructions as a basis for further comparative studies.*

**Key words:** optative constructions, modality, semantics, Bulgarian

### INTRODUCTION

Constructions with optative meaning of the type *спи ми се/не ми се спи* 'I feel like sleeping/I don't feel like sleeping' have been and still are of interest to linguists (Penchev 1998: 146-157; Koeva 2004: 199-206; Petrova 2006: 135-141, 154-156; Dzhonova 2008; Dimitrova 2015; Ivanova, Gradinarova 2015: 187-189; Petrova 2016: 17-19; Petrova 2017). Their characteristic is that the modal component in their meaning is implicit and the object of desire is expressed with a dative constituent. Similar structures can also be found in the other Slavic languages, which makes them an interesting object of comparative studies regarding their occurrence, formal specificity and nuances in meaning. Such interlingual analyses have been carried out mainly of the South Slavic languages and Russian (Uhlík, Žele 2018, Mitkovska 2019, Georgiev 1990, Ivanova 2017, Gradinarova 2017, among others).

Despite the number of studies, in Bulgarian linguistics there are still different views about the nature of these particular constructions. The aim of the present work is to present the specific way in which they conceptualize the desire, the features of the Bulgarian structural model and the respective semantic varieties. This, in turn, can serve as a reliable basis for further in-depth contrastive research in Slavic syntax.

### CONCEPTUAL AND STRUCTURAL MODEL OF CONSTRUCTIONS WITH OPTATIVE MEANING

As seen in linguistics, optativity is one of the main types of modal meanings (TFG 1990: 67-68) and is related to the so-called subjective modality. One of the ways to express an optative meaning is by lexical means, e.g. by using the verb *искам* 'want':

- (1a) *Искам да спя.*  
'I want to sleep'  
(1b) *Не искам да пуша.*  
'I don't want to smoke'

Another way to express the presence or lack of desire for something is by using constructions with a dative subject, where the modal component in the meaning is not explicit, e.g.

- (2a) *Спи ми се.*  
'I feel like sleeping'  
(2b) *Не ми се пуши.*  
'I don't feel like smoking'

Usages (1) and (2) pose a couple of questions: first, are the constructions synonymous; and, second, what determines the modal semantics of the version with a missing verb with a modal meaning, as in (2). These issues will be discussed in I and II, respectively.

I. Undoubtedly, the two versions have similar semantics. It is an interesting fact, however, that there are cases of joint usage of the constructions in the same sentence, which shows that for native speakers their meanings are different, e.g.

(3a) *Искам да спя, но не ми се спи.*

‘I want to sleep but I don’t feel like sleeping’

(3b) *Не искам да пуша, но ми се пуши.*

‘I don’t want to smoke but I feel like smoking’

To reveal the specificity of the two versions, the difference in the conceptualization of the wish has to be studied. The motives for the desire in (1) can be different. In (1a) somebody wants to sleep because he or she has to be already asleep (if it is late at night) or does not want to smoke (1b) because he or she intends to give up smoking. This shows that a distinctive feature of the structures with a verb with modal meaning is the presence of a will, i.e. an intention of the subject to do or not to do something (to sleep, not to smoke). In another context, a different interpretation is possible: somebody wants to sleep because he or she is tired and can hardly keep his or her eyes open (1a) or does not want to smoke because he or she does not feel the need to do it (1b). This means that such uses allow for ambiguity under certain conditions.

The second type of structures, without a verb with modal meaning (2), refers to situations where somebody wants to sleep because he or she is sleepy (2a) or does not want to smoke because he or she does not feel the need to do it (2b). Therefore, there is a lack of intention to do or not to do something because the structures are about a desire provoked by a subjective need. The lack or presence of such a need is the reason for the lack or presence of a desire, respectively. This desire is therefore unintentional, because it is caused by an internal need. The comparison shows that, while the constructions with a verb with modal meaning (1) allow for two different interpretations in different contexts, in the constructions without a verb with modal meaning (2) the meaning is unambiguous. This leads to the conclusion that the second type of constructions have a semantic specialization related to presenting the desire as caused by an internal need.

As for the joint use of the constructions in (3), it proves and clearly indicates the difference in their meanings and specializations. In such uses,

the presence or lack of internal need, and, as a result, the willingness or unwillingness of the subject, is contrasted with the intention to do or not to do something.

The difference in conceptualization reflects on the different way of structuring too. In both versions (with nominative subject and dative subject) there is an experiencer argument. In the first, however, it is in subject position, while in the second, it is in object position marked with dative case. This fact can be explained by the nature of the need. It is a particular internal perception of the subject’s necessities and, in this sense, plays the role of an inciting force or a factor which causes the appearance of a desire. Therefore, here the subject’s lack of intention is expressed with a change in the structural model, where the experiencer argument is projected not in a subject, as in (1), but in an object position (2).

The expression of the experiencer with a dative constituent is typical of all Slavic languages. In Bulgarian, however, it is presented by a dative clitic (a short form of the personal pronoun) which cannot be omitted or substituted with a noun. It is only possible to double it with a noun (4b) or the full form of the pronoun (4c):

(4a) *Танцува им се.*

‘They feel like dancing’

(4b) *На момичетата им се танцува.*

‘The girls feel like dancing’

(4c) *И на тях им се танцува.*

‘They feel like dancing too’

The reason for the obligatory use of the dative clitic in the Bulgarian model is that contemporary Bulgarian has lost its case system compared to its previous historical stage as a synthetic language. The other formal markers of the construction are the presence of the *се* ‘se’ particle and the restricted verb paradigm: 3<sup>rd</sup> person singular or plural. Besides, the verbs used (transitive or intransitive) are only of the imperfective aspect type. Therefore, from a formal point of view, the structural minimum includes a dative clitic, the *се* ‘se’ particle and a verb denoting the desired action or state. The modal component in the meaning of the constructions is implicit.

II. The lack of a verb with modal meaning in the surface structure poses the question what determines its modal semantics. The verbs that appear in the constructions (*спя* ‘sleep’, *пуша*

‘smoke’, etc.) present the action or state that could lead to satisfying the respective need. Their meaning, however, has no relation with modal semantics, and, respectively, with the role of experiencer (the ‘feel like’ subject) of the dative clitic. It can be supposed that the construction itself (verb in 3<sup>rd</sup> person, dative clitic, and *се* ‘se’ particle) determines the optative meaning. This thesis is, however, refuted by the fact that there are sentences containing the same combination of the three elements that allow for two different readings, e.g.

(5) *Нищо не ми се обяснява.*

Sentence (5) can be interpreted as follows: first, nobody explains anything to me, and, second, I don’t feel like explaining anything (see also the example of Penchev 1998: 150). This shows that the construction cannot determine the optative meaning by itself and that there are different generating mechanisms behind the identical surface structure, i.e. there are different base structures.

In the first interpretation the dative clitic is an internal argument with the semantic role of ‘beneficiary’ (the person to whom something is explained). Its appearance in (6a) is due to the argument requirements of the verb *обяснявам* ‘explain’ (*somebody* explain *something*, *to somebody*). As for the structure in (6b), it is the result of a passive diathesis:

(6a) *Никой нищо не ми обяснява.*

‘Nobody explains anything to me’

(6b) *Нищо не ми се обяснява* (от никого).

‘Nothing is explained to me (by anybody)’

The appearance of the *се* ‘se’ particle in (6b) signals that the agent argument (*никой* ‘nobody’) from (6a) vacate the subject position and the form of the verb changes from active to passive (*обяснявам* → *обяснява се*). Besides a syntactic transposition, (6b) also involves a reduction in the syntax of the external argument (*от никого* ‘by anybody’).

In the constructions with optative meaning the semantic role of the dative clitic is ‘experiencer’ (‘feel like’ subject). A position for such an argument, however, is opened by the personal verb *искам* ‘want’. In this case, the experiencer argument is external and is realized as a subject. The optative action or state is

expressed with a sentential complement (*da*-clause), which takes an object position (7a). When the wish is the result of a subjective need, i.e. when there is a lack of intention by the subject, there is a change in the conceptual and, consequently, in the structural model. This change is related to the projection of the experiencer argument in indirect object position and the projection of the *da*-clause in subject position (7b). A signal of this transformation is the appearance of the *се* ‘se’ particle (as in the passive diathesis), i.e. *аз искам да ...* → *иска ми се да ...*, e.g.

(7a) *Искам да танцувам.*

‘I want to dance’

(7b) *Иска ми се да танцувам.*

‘I feel like dancing’

Sentence (7b) is therefore the result of optative diathesis motivated by a change in the conceptualization of the desired situation. Besides, in (7b) there is coreference of the experiencer argument with the argument in subject position of the *da*-clause (*Иска ми<sup>1</sup> се аз<sup>1</sup> да танцувам*). This allows for a secondary transformation related to non-expression of the verb with modal meaning in the base structure (9 and 10). If the verb in the subordinate subject clause in the base structure is intransitive, the construction with unexpressed verb with modal meaning is impersonal (9b):

(9) а. *Иска ми се да танцувам* → б. *Танцува ми се.*

(10) а. *Иска ми се да пия кафе* → б. *Пие ми се кафе.*

Examples (9 and 10) explain the optative meaning of the constructions without a verb with modal meaning as well as the experiencer role (‘feel like’ subject) of the dative clitic. Besides, they show that the bi-clausal structure is basic for optative constructions such as *сти ми се*, *не ми се пие кафе*, etc. (Petrova 2006: 154-156, Dimitrova 2015: 26).

The possibility for a secondary transformation of the bi-predicate structure is, however, restricted. As already shown, one of the conditions is the presence of coreference between the logical subject and the argument in subject position in the dependent clause, as in examples (7b), (9) and (10). What is more important, however, is that the dependent clause presents the motive for the occurrence of the

desire and this is the presence of an actual need at a certain moment. This moment can be in the present (*иска ми се да танцувам* → *танцува ми се* ‘I feel like dancing’) or in the past time (*искаше ми се да танцувам* → *танцуваше ми се* ‘I felt like dancing’). Therefore, a key condition for the transformation is the presence of a feeling for a subjective need (primary or secondary). The other cases of bi-predicate structures where the transformation is impossible denote a desire which is subjectively motivated, but is not based on a need:

(11) *Иска ми се Covid да свърши, за да можем да се прегръщаме* (spisanie8.bg).

‘I wish this Covid was over so that we could hug again’

(12) *Иска ми се да не бях слушал тази песен* (You Tube).

‘I wish I hadn’t listened to that song’

(13) *Иска ми се да беше тук* (vbox.com).

‘I wish you were here’

(14) *Иска ми се да бяхме имали повече време* (momichetata.com).

‘I wish we had had more time’

In the language, there are also more specific uses of bi-predicate constructions presenting another motive for their use. For example, in a TV show (*Oshte ot denya*, BNT) the hostess addressed her guest in the following way:

(15) *Иска ми се да се върнем на въпроса за разногласията във Вашата партия.*

‘I’d like to /I wish we could return to the question of the dissent in your party’

Thus formulated, the sentence aims to make the categorical *искам* ‘want’ less direct as an expression of will and replace it for the more indirect *иска ми се* ‘I’d like to /I wish we could’ to state a desire for the interlocutor to elucidate a question that he or she apparently avoids. Similar cases reveal a new aspect of the semantic specialization of bi-predicate structures related to the expansion of their use in modern Bulgarian.

#### SEMANTIC SPECIFICITY OF THE CONSTRUCTIONS WITH OPTATIVE MEANING

Semantically, the dictionary provides a clearly optative definition of the *иска ми се* ‘I feel like’ construction: “have a strong desire for something” (BTR 2008). Authors such as K.

Cholakova (Cholakova 1976: 102) and K. Ivanova (Ivanova 1983: 242) present its meaning as “feel a strong desire for something”. As seen, they all emphasize the strength and intensity of the desire. This “strength” actually originates from the fact that it is caused by the feeling of subjective need which has to be satisfied. This need, as has already been mentioned, has the role of a causative factor for the appearance of the wish and is essential for the semantic specialization of the constructions.

In psychology, needs are defined as a state of the individual provoked by different types of necessities. Two types of needs are distinguished: primary and secondary.

Primary needs are basic needs and are linked to the biological necessities of the human being, i.e. the sensation of hunger and thirst, the need for sleep, etc. (see Petrova 2006: 135-141). These physiological (organic) needs have a universal character.

The second type of needs is specific for each person. They are defined as secondary because they are motivated by subjective preferences, inclinations and interests of different character which satisfy sensations of contentment, comfort, spiritual and aesthetic pleasure (see Petrova 2006: 154-156). For example, the desire to eat ice-cream or drink whisky does not mean that you are hungry or thirsty, but is provoked by personal taste. The same applies to a variety of activities and pursuits, such as sports, entertainment, social interaction, art, etc., i.e. the whole social, cultural and spiritual realm which a person finds important and satisfying.

On the basis of the two types of needs, two types of semantic varieties in the optative constructions can be differentiated. The first present a desire originating from primary needs (16) and the second present a desire motivated by secondary needs (17):

(16a) *Пие ми се вода* (= жаден съм).

‘I feel like drinking water’ (= I am thirsty)

(16b) *Не ми се яде* (= не съм гладен).

‘I don’t feel like eating food’ (= I am not hungry)

(16c) *Ходи ми се до тоалетната.*

‘I feel like going to the toilet’

(16d) *Не ми се спи.*

‘I don’t feel like sleeping’ (= I am not sleepy)

(17a) *Ядат ми се ягоди.*

‘I feel like eating strawberries’

(17b) *Пиe ми се уиски.*

‘I feel like drinking whisky’

(17c) *Вече е на години и пак ѝ се танцува.*

‘She is past her prime but she still feels like dancing’

(17d) *Слуша ми се джаз.*

‘I feel like listening to some jazz’

It can be summed up that the semantic specialization of optative constructions is related to the expression of a desire to satisfy primary or secondary subjective needs. Accordingly, the lack of desire for something means that there is a lack of internal impulse or a need as a causative factor.

The semantic specialization of optative constructions determines what verbs it is possible or impossible to use in them. Generally, the range of verbs is too wide, and the restrictions are mainly of semantic nature. On the one hand, these have to be verbs which take an external argument with the feature [+animate], and to a great extent (mainly with regards to the secondary needs) with the feature [+human]. On the other hand, these have to be verbs which denote actions or states that satisfy primary or secondary needs or that can be considered subjectively unacceptable.

In this respect, one of the restrictions is related to verbs which denote automatic, not subject to volitional control actions or reactions of the organism, because they happen irrespective of the subject’s will. For example, it is illogical to have a desire to blink (\**мига ми се* ‘\*I feel like blinking’), to sweat (\**изпотява ми се* ‘\*I feel like sweating’), to forget (\**забравя ми се* ‘\*I feel like forgetting’), breathe (\**диша ми се* ‘\*I feel like breathing’), etc. It is quite different, however, if the verb *дишам* ‘breathe’ is related to the quality of the air: *Диша ми се чист въздух* ‘I feel like breathing some fresh air’, *Не ми се дишат отрови* ‘I don’t feel like breathing toxins’. The use of verbs of auditory or visual perception, namely *чувам* ‘hear’ and *виждам* ‘see’ is similar: \**чува ми се* ‘\*I feel like hearing’, \**вижда ми се* ‘\*I feel like seeing’. There are, however, some untypical uses when the constructions are used in a different context and the verbs acquire a different meaning, e.g. *Не ми се чуват* (= *слушат*) *такива приказки* ‘I don’t feel like hearing (= listening to) such things’, *Не ми се вижда* (= *среща*) *с него* ‘I don’t feel like seeing (= meeting) him’, etc. The same applies to the verb *мръзна* ‘freeze’ in the sentence *Не ми се мръзне по стирките* ‘I don’t

feel like freezing at bus stops’, which means that I do not want to wait at bus stops where it is cold. In this case I cannot control the freezing, but whether to wait or not to wait at bus stops is under my control.

## CONCLUSIONS

As a result of the above analysis, it can be summarized that the base structure for the constructions with optative meaning of the type *спи ми се/не ми се спи* ‘I feel like sleeping/I don’t feel like sleeping’ is a bi-clausal structure, which, in turn, is the result of an optative diathesis of a construction with the verb *искам* (*искам да* ‘I want to’ → *иска ми се да* ‘I feel like/I wish’). The motive for this is the different way of conceptualization related to presenting the act not as an expression of will, but as a desire originating from subjective needs. The non-expression of the modal component of the structure is the result of a secondary transformation (*иска ми се да спя* → *спи ми се*). The change of the conceptual model also reflects on the different syntactic realization of the experiencer, which takes object instead of subject position and is expressed in Bulgarian with a dative clitic. The key condition for the formation of such structures is the presence of a feeling for different types of needs: primary or secondary. This, in turn, determines the distinction between two semantic variations related to the two types of needs.

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## FOREIGN LANGUAGE ANXIETY AND TEST ANXIETY AMONG PEDAGOGY STUDENTS

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### ABSTRACT

*Feeling anxious is undeniably a common experience in the academic environment. The purpose of this research is to investigate the degree of both Foreign Language Anxiety (FLA) and Test Anxiety (TA) among 25 pedagogy students learning English as a foreign language. The Foreign Language Classroom Anxiety Scale (FLCAS) developed by Horwitz et al. (1986) and the Test Anxiety Scale (TAS) developed by Sarason (1975) were used in this study to measure foreign language anxiety and test anxiety. Most research suggests that these types of anxiety have a negative correlation with academic performance. Therefore, educators may need to adopt strategies to reduce anxiety among students and thus boost academic performance and achievement.*

**Key words:** *foreign language anxiety, test anxiety, pedagogy students*

### INTRODUCTION

In the last four decades, a great deal of research has been done on specific types of anxiety relevant to students' behavior and academic performance. Studies have shown that students can be anxious at all levels of education and foreign language proficiency, and that anxiety can be really debilitating for those who experience it in extreme ways.

Spielberger (1983:15) defines anxiety as "the subjective feeling of tension, apprehension, nervousness, and worry associated with an arousal of the autonomic nervous system." According to Horwitz et al. (1986: 125-132) "the concept of anxiety is itself multi-faceted, and psychologists have differentiated a number of types of anxiety including trait anxiety, state anxiety, achievement anxiety, and facilitative-debilitative anxiety." Phillips (1992:14-26) defines trait anxiety as "a relatively stable tendency to exhibit anxiety in a large variety of circumstances", whereas the other basic type of anxiety is defined as "a situation-specific trait anxiety; that is, an individual suffering from state anxiety will manifest a stable tendency to exhibit anxiety but only in certain situations" (Phillips 1992, as cited in Salehi & Marefat 2014: 931-940).

Horwitz (1986: 125-132) states that foreign language anxiety (FLA) "is categorized as a situation-specific anxiety, similar in type to other familiar manifestations of anxiety such as stage fright or test anxiety." and defines it as "a distinct

complex of self-perceptions, beliefs, feelings and behaviors related to classroom language learning arising from the uniqueness of the language learning process". As a matter of fact, Horwitz, Horwitz and Cope were the first to consider that FLA is a unique type of anxiety specific to foreign language learning and their theory of FLA plays a major role in language anxiety research (Trang 2012: 69-75).

In 1989, MacIntyre and Gardner conducted a study and concluded that foreign language anxiety is indeed a distinct form of anxiety. They also determined that test anxiety is more related to general anxiety than simply a component related specifically to foreign language anxiety (MacIntyre & Gardner 1989: 251-275).

Test anxiety (TA) refers to "the set of phenomenological, physiological, and behavioral responses that accompany concern about possible negative consequences or failure on an examination or similar evaluative situation" (Zeidner 1998). Test Anxiety occurs in specific test situations and tends to create cognitive interference that can affect students' self-image because "intelligence is inferred from how people perform at certain kinds of tasks. Poor performance, however, does not necessarily mean low intellectual potential; it could be because the individual was upset, thinking about something else, or unmotivated." (Sarason et al. 1995: 285-296).

The highly test anxious person worries about examinations and shows physiological reaction patterns that go along with worry and worry is a



cognitively demanding activity marked by self-preoccupation, self-depreciation, and concern over the consequences of poor performance. (Sarason 1975: 193-217)

## RESEARCH OBJECTIVES

The objectives of this study are to:

1. Investigate the degree of Foreign Language Anxiety (FLA) and Test Anxiety (TA) among pedagogy students learning English as a foreign language at “Prof. Dr. Asen Zlatarov” University in Burgas, Bulgaria.

2. Decide whether the adoption of anxiety reducing strategies by educators and students is necessary in the context of stressful environments, such as the foreign language classroom.

## METHOD

The present study was conducted by using the quantitative research method.

### *Participants*

The participants of this study were 25 second and third-year pedagogy students (mostly females) enrolled in general English classes at “Prof. Dr. Assen Zlatarov” University in Burgas, Bulgaria. The students involved in the study were at Elementary and Intermediate levels of English according to the Common European Framework of Reference for Languages (CEFR).

### *Instruments*

The Foreign Language Classroom Anxiety Scale (FLCAS) and the Test Anxiety Scale (TAS) were used in this study. Both questionnaires were translated into Bulgarian by the researcher.

#### 1. Foreign Language Classroom Anxiety Scale

The FLCAS was developed by Horwitz et al. (1986) and measures different components associated with foreign language anxiety. It consists of 33 items rated on a five-point Likert scale. The score for each item ranges from 5 for strongly agree to 1 for strongly disagree. Items number 2, 5, 8, 11, 14, 18, 22, 28 & 32 are negatively-worded, therefore the scoring was reversed.

The extensive use of the FLCAS in different studies (Aida 1994: 155-168; Horwitz et al. 1986: 125-132; Saito et al. 1999: 202-18; Liu 2006: 301- 316) leads to the conclusion that it is generally a reliable and valid tool.

#### 2. Test Anxiety Scale

The TAS was developed by Sarason (1975). It consists of 37 items and is based on the theory

and evidence that test anxiety is composed of test-relevant and test-irrelevant thinking. The questionnaire was originally written in true-false format, but it was later changed to a five-point Likert scale (1 = completely disagree; 2 = disagree; 3 = neutral; 4 = agree; 5 = completely agree) because five-point scales are interval scales and are more likely to provide normally distributed data, and they increase the accuracy of responses compared to two-point scales (In'nami 2006: 317-40). Items number 3, 15, 26, 27, 29 & 33 are negatively-keyed for anxiety and, again, the order of the scoring was reversed.

In'nami (2006: 317-40) acknowledged the validity of the scale after conducting exploratory factor analysis and confirmatory factor analysis.

## RESULTS AND DISCUSSION

The purpose of the study was to investigate and measure the levels of foreign language anxiety and test anxiety among pedagogy students and whether the adoption of strategies to reduce anxiety among these students is necessary.

The study shows that among intermediate level students test anxiety is more common than foreign language anxiety. Only one out of 7 (14.28%) intermediate students exhibits foreign language anxiety. Test anxiety is more common among respondents with 3 out of 7 (42.85%) exhibiting test anxiety.

However, foreign language anxiety and test anxiety both appear to be more common among elementary level students with 6 out of 18 (33.33%) respondents exhibiting foreign language anxiety and 12 out of 18 (66.66%) respondents exhibiting test anxiety. Therefore, we can conclude that some anxiety reducing strategies and activities such as games and pair work might be useful in the classroom to improve achievement and motivation and enhance academic performance.

## CONCLUSION

It is not entirely clear whether foreign language proficiency is a significant factor influencing anxiety in the classroom or if anxiety plays a significant role in the learning process and thus influences academic performance. However, this study shows a correlation between anxiety and performance. A significant percentage of elementary students exhibit both foreign language anxiety and test anxiety, which suggests that perhaps fluency is a critical factor in perfor-

mance and anxiety reducing techniques could be used in the classroom. A previous study suggests that students can be anxious at all levels of education and foreign language proficiency. Therefore, anxiety-reducing techniques could be used to help students at all levels.

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## SUNNY BEACH – DESTINATION FOR MASS SEA AND/OR CLIMATE AND SPA TOURISM

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### ABSTRACT

*The most common type of tourism is the one most people associate with recreation. People like to visit places that are very different from their usual daily life to relax and have fun. Sea holiday tourism is the most preferred worldwide. What has been impressive in recent years is that the group of tourists looking for the different and unique, unique and healthy is increasing. Climatotherapy and spa tourism are gaining more and more popularity and are increasingly preferred by modern tourists. The purpose of this article is to examine the possibilities of the largest Bulgarian seaside holiday complex for the development of climate, balneo and spa tourism. The tasks that should be answered in the implementation of the goal thus set are: to examine the resources, super and infrastructure of Sunny Beach, which is also the object of the study, ensuring the development of these alternative types of tourism. In conclusion, the current challenges and opportunities for the development of the destination are highlighted.*

**Key words:** mass, sea, vacation tourism, climate, balneo and spa tourism, challenges and opportunities

### INTRODUCTION

#### SUNNY BEACH RESOURCES

##### Natural Resources

"Sunny Beach" resort, as well as the entire Bulgarian Black Sea coast, has a rather diverse relief, specifically the complex is located in a large desert plain, which borders the Hadzhiyska River to the west. To the north are the easternmost parts of the Eastern Stara Planina, and in this section the Balkan divides into two main parallel ranges - Udvoy Planina in the south and Mator Planina in the north.

The Kamchia mountain, whose highest elevation is Mount Kamenyak (627 m) is located to the north, and to the south is the Emin mountain, whose highest point is the Mandrabair massif (621 m). The Emin mountain is considered as a continuation of the main ridge and ends at the steep and rocky Cape Emine, which is a kind of attraction with its lighthouse. This is precisely where the marked route of one of the largest off-road races in Bulgaria ends on the ridge of Stara Planina, starting from Mount Kom, which attracts and is watched by hundreds of tourists [4].

The Black Sea is naturally located to the east of the resort "Sunny Beach" and is the main reason for the popularity of the place and for its transformation into the most significant Bulgari-

an sea resort and an attractive place for millions of tourists. The warm and typically transitional continental and transitional Mediterranean climate of the "Sunny Beach" resort makes it truly sunny. What distinguishes it is "mild winters and dry and hot summers with the average summer air temperature being 25°C and water 22 – 24°C, the average annual duration of sunshine being about 2,300 hours, with only from May to October there are 1,700 hours of sunshine, and per day in July and August the daily duration reaches 10.5 – 11 hours" [5].

Specific to the climate of the resort are the cool spring and warm autumn, which has also been quite warm, especially in recent years, as a result of climate changes. As a result, September and October are quite pleasant months and the bigger sea lovers go to the beach even during these months. It rarely rains.

The influence of the sea also had a great impact on the character of the vegetation, which was formed as very diverse. Of greatest interest are the longose forests developed on the floodplain terraces near the mouths of the rivers. Another interesting and rare phenomenon are natural sand dunes near the "Sunny Beach" resort, which can reach up to 25 meters. The longest sand dune in Bulgaria is actually described here.

Surveys by the Botanical Institute at the Bulgarian Academy of science show that in the dunes of the "Sunny Beach" resort there are unique plants, including protected species. The sand dunes accumulate part of the little moisture and preserve it for some plant species, which are about 32 biological species, 17 of which are included in the Red Book of Bulgaria, three of them are on the European list of rare endangered species in Europe, protected by convention. Some of the protected plant species are *Scilla bithynica*, Butterfly orchid. As for the fauna, some unique animal specimens have been brought to the complex for commercial purposes.

What also cannot be overlooked are the mineral springs in Sunny Beach and nearby Pomorie, as one of the most valuable natural treasures of the destination. The data show that on the relatively small territory of our country there are over 240 hydro-mineral deposits, with over 800 spring and borehole mineral waters, with a large total flow rate, about 31,000 l/sec. More than 75% of them are warm or hot, and in terms of physicochemical composition, almost all types of mineral waters found in the world are represented. Most of them are located in Southwestern Bulgaria and along the Black Sea, in ecologically favorable areas with an attractive landscape. Unfortunately, a very small amount of this valuable natural resource is currently being used.

The hydrothermal sources concentrated on the Black Sea coast are mostly used to increase the balneotherapy efficiency in the resorts, as "complex treatment and prevention is applied, as the hydromineral procedures are combined in an appropriate form with other physical methods: therapeutic gymnastics and kinesitherapy, therapeutic massage, peat-calor and paraffin treatment, sauna, acupuncture, electrohypnosis, music therapy with rational psychotherapy, dietary nutrition and others, and, if necessary, appropriate drug treatment is applied." In the large Bulgarian spa resorts along the Black Sea coast, there are spa hotels, several sanatoriums, rest homes and boarding houses, which are available to the tourism industry in the country [2].

The mineral springs of Bulgaria, and in particular in the "Sunny Beach" resort, remain underappreciated today as an opportunity to raise the image of medical tourism, which is also not affected by seasonality and can attract more tourists from outside with the good its quality, unique resource and lower prices. When the favorable geographical position of the country, the varied climate, the long sunshine and the natural

features are added to them, it can be said that balneotherapy is a golden chance for the analyzed destination and touristic Bulgaria as a whole.

#### **Anthropogenic tourism resources of the area**

"Anthropogenic tourism resources such as landmarks are the result of human activity and have a predominant cultural-cognitive effect. They are created by man and are his work and cover those objects and phenomena that are unnatural and unnatural in nature. These are historical, archaeological, cultural, educational, ethnographic, folklore, religious, architectural, economic, etc. objects and events that have a wide constructive range with a contributing symbiotic, unique and attractive local character and territorial distinctiveness of the tourist destination" [1].

What makes the resort "Sunny Beach" anthropogenically rich is its proximity to the natural historical reserve - the town of Nessebar. According to the World Heritage Committee, tourists can find archaeological traces of "numerous civilizations" here, which are cited as a very important factor in the outstanding universal value of the site. connoisseurs are attracted by the chronology of the successive accumulation of valuable archaeological layers. The earliest traces so far discovered date from the 8th-7th century BC (Second Phase of the Early Iron Age). Next: layers of the Greek colony of Mesambria (fragments of the defense system of the peninsula, ruins of the temple of Zeus Hyperdexus, remains of residential buildings and warehouses, data about the Agora and Acropolis, etc.); layers from the Roman period and late antiquity (the new fortification system with the main gate, the Imperial Baths and the unique water supply system, etc.). With the acceptance of Christianity in Late Antiquity and the Early Middle Ages, there was a strong impetus in the building of the temple at Mesembria. Later, in the period from the 9th to the 14th century, the development of the remarkable church construction continued along with the restoration and addition of height to the fortification system. The excavated (after the inscription on the property) necropolis of Mesambria-Mesembria-Nessebar, which is located on the mainland and includes monuments from the Hellenistic period to the Middle Ages, is extremely valuable. Today, a significant part of the early archaeological strata is located on the seabed in the rich and insufficiently explored water area.

Another important feature of the outstanding universal value of the Ancient City of Nessebar is its millennial exposition as a "remarkable spiritual center of Christianity". Due to its strategic location, the city plays a key role in the constant cross-cultural exchange and has an influence on the religious architecture not only in the Bulgarian lands, but also in the "Byzantine cultural sphere". It is there that it reaches its apogee, the "picturesque architectural style" - a synthesis between architectural form and colorful decoration. The churches of Nessebar, reaching to the present day - the old metropolitan basilica "St. Sophia", the basilica "Holy Virgin of Eleusis", the basilica in the northwest and the three-nave basilica; the unique medieval churches of St. John the Baptist, St. Stephen, St. Demetrius, St. Clement, St. Theotokos Blacherna, St. Theodore, St. Archangel Michael and Gabriel, St. Pakaskeva, Christ Pantocrator, St. John Aleituritos, Revival St. Spas and Assumption of the Virgin Mary - are the result of almost fifteen centuries of construction work and reveal the distinctive development of Orthodox Christian architecture and culture.

The exceptional universal value of the property also contributes to the "preserved Renaissance structure" with numerous typological checks reflecting "the stages of development of the architectural style in the Balkans and throughout the Eastern Mediterranean region" (World Heritage Committee), typical examples of the Nessebar House, manifested through the free development (with a rectangular or L-shaped planning scheme) as well as from the connected housing development (with a backyard and passage, with shops and workshops on the ground floor).

Also of importance is the intangible cultural heritage, which enriches the intangible dimensions of the historical urban landscape and expands the content of outstanding universal value of the place. Here can be counted:

- urban traditions, holidays and customs, such as Epiphany (January 6); The March for Health and Wellbeing (May 11); Bread Day (June 22); Nessebar Day (Assumption); St. Nicholas Day, etc.;
- legends, as a manifesto of local folklore, mostly associated with the churches of the peninsula;
- traditional life, crafts and skills, such as fishing, boat building, local cuisine, wine production, small-scale home production, etc.

All this reveals a very good opportunity for the development of cultural, historical and reli-

gious tourism in the resort "Sunny Beach", given the trend of growth of this type of tourism on a global scale. While in the middle of the first decade of the 21st century, about 40% of tourists in the world practiced this type of tourism, now (according to a survey of 10,000 people from around the world conducted by visitbritain.com) 57% of tourists indicate that they choose culture or cultural heritage as a reason to travel. This is due, on the one hand, to the increasingly available information on various cultural and historical topics, and on the other hand, to the increase in short city and weekend vacations for the purpose of visiting cultural events.

New transport services (e.g. low-cost airlines), which make destinations accessible to more and more tourists, also contribute to the development of this type of tourism. As a result, cultural tourism occupies 11.1% of the share of all tourist products in Bulgaria, and the main competing cultural tourism destinations for Bulgaria are: Spain, Italy, Greece, Turkey, Romania. Which speaks for the good prospects of the "Sunny Beach" resort in this direction.

The primary target markets can be the 14% of Europeans who choose culture as their main motive for travel, and the secondary target markets are travelers for whom cultural tourism is an additional value-added experience. The generating markets are Russia, England, Germany, Romania, Greece, Turkey, Italy. As for the promising markets for Bulgarian cultural and historical tourism, they are Russia, Ukraine, Serbia, Greece, Great Britain, China, Japan and the USA.

The profile of the Bulgarian tourist looking for a cultural tourism product is extremely close to that of the international tourist, namely:

- more solvent and spending more on the spot;
- spends a longer time in a given tourist destination;
- stays more often in a hotel;
- more educated than the average level of tourists;
- a slight preponderance of travelers over 35 years old.

According to a study, both for tourists visiting the country for the first time and for those for whom the current visit for the purpose of vacation is at least the second, the leading motive for choosing Bulgaria is mostly the cultural and historical attractions.

As a result, cultural tourism is practiced by 12% of Bulgarian tourists in the summer (in third

place after sea and rural) and 18.6% in the off-season. This includes people of all ages, but mainly people living outside the capital. These types of tourists are readers rather than television watchers or radio listeners. In addition, these are more often groups with average and higher incomes, who realize trips at BGN 46 average expenditure per day in the off-peak season and an average length of stay of 2.8 days.

The profile of the international tourist interested in "cultural-historical tourism" is distinguished by the fact that 37% of tourists organize their holiday through a travel agency, and 26% travel unorganized and 36% plan their holiday about a month before their trip. Main source of information about them are tour operators and travel agencies as well as websites. Their age structure is distinguished by the fact that 49% are aged 36-55 and 36% are 15-35. The data shows that 55% were in Bulgaria and before. 30% are tourists from Western Europe, 25% from Balkan countries, 17% from Russia, who actually spent the longest time in Bulgaria (on average 8 nights), and the shortest - visitors from the Balkan countries (average 3.9 nights)" [6].

A longer vacation is typical for older tourists (over 65), pensioners, households with high monthly incomes, those who spent a "relaxing" vacation, traveling alone or in large groups of 5 or more people. The short stay is typical for persons of active working age (36-55 years), for those traveling without a prior reservation and for those visiting the country for the first time. 73% visited 2 or more places, the top places being Nessebar, Plovdiv, Sofia, Varna, Rila Monastery, Veliko Tarnovo.

#### **Infrastructure and superstructure of the area**

Regarding the complex's infrastructure, its transport network and the possibility of being easily accessible by public and private means of transport, as well as the water supply and sewage systems, electrification and communications, are of interest.

"Public transport is a structurally important part of the tourism industry, but it must also provide services that are not entirely dependent on tourist demand" [3].

Regarding the transport accessibility of the destination, it can be said that it corresponds to its general condition in Bulgaria, and in particular for the Black Sea region, as there is a wide network of air, road and rail services. Thus, most of the tourist sites are accessible precisely by

land transport, due to the geographical location of Bulgaria near Central and South-Eastern Europe.

On the other hand, Sunny Beach resort is located near Burgas and Varna airports, which, together with Sofia, mainly serve international destinations. This can be seen as a positive for the destination, as the three airports account for more than 69% of the international passenger flow.

However, land transport is the most developed part of the transport network serving the Black Sea region, and the territorial distribution of the road network is of crucial importance for the mobility of the population and transport accessibility to services of higher quality. Until recently, the problems in the area were mainly found in many of the third-class roads, whose condition was unsatisfactory. Today, quite a large part of the road network has been rehabilitated, several high-speed sections of national importance have been built, one of which is the ring road Burgas - Sunny Beach, providing quick access to the resort and the airport.

Railway transport in the area is also well developed - the largest station near the city center. "Sunny Beach" is Burgas. Unfortunately, although more ecological and cheaper, railway transport in our country and in particular in the analyzed region is not among the most preferred. It is important in this respect that the majority of the railway network is old and in poor condition and is only suitable for lower speed than for example used in Germany. This is the reason why rail transport is primarily a means of moving domestic tourist flows.

Sea transport in the area is provided by the port of Burgas, but an attraction for tourists is the yacht port in the town of Sveti Vlas.

The general conclusion, regarding the transport infrastructure, is that for the successful development of Black Sea tourism, some problems in the transport infrastructure still need to be solved, such as, for example, the poor condition of the roads, difficult access to some points, as they have an adverse effect on the overall tourist process.

As for communal communications, such as electricity and heat supply, water supply, sewage and waste water, it can be said that the water supply network is still one of the problem areas of the resorts along the southern Black Sea coast. The main problems mainly come from outdated water supply networks, and until recently they were more pronounced in smaller settlements,

but resorts such as Sozopol, Nessebar and "Sunny Beach" also suffered from them. Today, however, after significant investments made by the local authorities and thanks to the European Investment Funds, many of the water networks of the resorts and hub villages have been replaced or alternative ones have been built.

However, waste management continues to be a significant environmental problem in the Black Sea. Despite the legislative measures taken, landfills remain a problem - regulated and unregulated, as well as sea pollution, signals about which are received mostly in the summer, when all the hotels are functioning. The construction of treatment plants turns out to be only a partial solution and the local authorities continue to look for alternatives to make the Bulgarian Black Sea more attractive.

The conclusion that follows is that the communal facilities in the tourist centers of the Black Sea, and in particular in the "Sunny Beach" resort, are improving as a result of the investment, but still do not meet the requirements of the built tourist infrastructure. However, the good example exists and the municipalities can continue to solve these problems of their own through the Operational Programs of the EU.

As for urban design and architecture, the problem of redevelopment is most noticeable in Black Sea cities. The biggest victims of the major reconstruction along the Black Sea are the big hotels and those on the back line, which are finding it increasingly difficult to fill even half of their beds. However, it can be said specifically about the "Sunny Beach" resort that it is they and the new modern complexes with their own infrastructure and the possibility of year-round use that are the most promising for their development as spas and congress centers.

The conclusion that follows is that maritime urban areas today face serious challenges and opportunities. The hotels are new and shiny, but our seaside towns, regardless of their size, generally need a large-scale and concerted effort in this area to meet the needs of developing high-quality, sustainable tourism, as well as to offer unforgettable attractions and alternative types of tourism.

### **Environment and cleanliness**

Bulgarian nature has a rich natural potential consisting, as the data shows, of "mountains with over 4,000 open caves; 33.6% forested area, of which 96% are forests; over 600 mineral water sources; about 5% of the country's territory is

protected territories, of which: 3 national and 11 natural parks, 55 reserves, 35 maintained reserves, 441 protected areas, 349 natural attractions" [7].

In contrast to the aforementioned, the current state of the environment along the Black Sea is distinguished by the presence of air pollution from industrial emissions; pollution of rivers and the sea with raw waste materials, heavy metals, chemicals; deforestation, forest damage from air pollution; soil pollution with heavy metals from metallurgical plants and industrial waste water, as well as overbuilding in the resort areas, exceeding the load capacity of the resources - as is the case with the "Sunny Beach" resort.

The superstructure of tourism includes the base of hotels and restaurants and that of additional tourist services, and as for the geographical coverage of the specialized infrastructure in the country, there is a large concentration of hotels along the southern Black Sea coast, with their density being most significant precisely in .k. "Sunny Beach". As the data shows, in the last fifteen years it is the Black Sea hotel infrastructure that has seen one of the highest growth rates in Europe, including compared to Bulgaria's direct competitors – Greece, Turkey, the Republic of Croatia, Romania. The hotel capacity in the main host countries of Europe grows annually by 3-4%, while in Bulgaria over the last 8 years the average annual growth rate is 12% or 3 times higher" [6].

Experts in tourism report that as a result of the faster growth of bed capacity compared to the growth of tourists and the nights spent by them, a decrease in employment is reported, incl. and from foreigners. There is also a confirmation of the dominant role of the extensive approach, where the growth of turnover and foreign exchange earnings closely follows the growth of the hotel base. As a result, the Bulgarian business and state receive two times lower foreign exchange earnings from one tourist unit (one tourist, one occupied room), mainly due to the relatively low price levels of hotels along the Black Sea.

### **Challenges facing the "Sunny Beach" resort and related opportunities**

The current state of tourism is evaluated, taking into account the above characteristics and requirements of modern sustainable cultural tourism, as well as the need to diversify the tourist product with the aim of increasing its attractiveness on the one hand, and changing the image of

the destination on the other - a quality and valuable place for new experiences. From this point of view, the following general positive assessment of the development of tourism can be made:

- The destination is already popular, as it has favorable natural conditions for the development of sea vacation tourism - moderate climate, wide beaches, fine sand - ten Bulgarian beaches have been awarded the "Blue Flag" international distinction. The resort is of national importance for our country, as it generates the most significant revenues in the tourism industry.

- "Sunny Beach" resort mainly offers sea recreational tourism, but there are also opportunities to combine it with balneology, spa and wellness tourism, given the mineral resources and modern balneotherapy and spa centers. The prospect of offering cultural-historical and religious tourism is also significant given the fact that it is located near Nessebar.

- Tourist infrastructure and superstructure is also relatively well built - availability of high-class hotels (four and five stars). Public catering establishments, which offer both traditional Bulgarian cuisine and various other options, are also quite popular.

- Ratio between price and quality of the offered tourist goods and services can be assessed as good, but also tends to be low. This outlines prospects for improvement, working in terms of diversifying the product and realizing opportunities to practice alternative types of tourism.

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The results of the conducted monitoring, compared with the mentioned modern trends in cultural, religious, adventure, spa, wine and

gourmet tourism, also show the following challenges that should be overcome:

The destination does not function as a complete tourism product, living up to its outstanding universal value. Reconstruction, defects in the communication and information infrastructure contribute to this; the chaotic location of shopping and dining venues, as well as entertainment venues in public areas; unattractive relationship with the nearby cultural-historical and religious features of Nessebar. As a result of the above, for the period 2010-2018, the percentage of tourists who visited the destination for the purpose of cultural and/or religious tourism was only 8.5%.

The above aspect lacks urban cultural tourism routes linked to many other municipal and national tourism products, as well as to the networks of European cultural routes.

The destination mainly offers marine recreational tourism, which is why the tourist infrastructure is distinguished by standard conditions - it is uniform and there are no places for alternative entertainment and development of some alternative types of tourism.

Tourism in the Sunny Beach resort is mostly seasonal, with a high concentration in the summer months, which leads to an intensification of impacts and often leaves the resorts and their population without alternative sources of income during the rest of the year. Only hotels established as congress and spa centers are sold as year-round. However, there are periods of the year - early autumn and late spring - when the capacity of the destination can be more fully realized by offering wine and gourmet tourism, adventure experiences, golf and more. sporting events.

The pollution of coastal marine waters and the fact that in many places the coastline is affected by landslides and erosion processes is also a problem that repels tourists, which on the one hand must be solved sustainably, and on the other - can be compensated, as tourists off-the-beach experiences are offered.

Last but not least, a problem in the complex is the insufficiently good tourist service and the fact that a large part of the staff is seasonal, hired randomly without investment in their training.

The lack of tourist innovation and an attractive strategy for marketing management of the destination can also be identified as a problem, which is signaled by the publications in the foreign press about the resort "Sunny Beach" as a cheap and alcohol tourism-related place. Based on this, a lack of an adequate promotion strategy



can be observed to launch the exceptional universal value of the resort in the European and world tourism markets using modern methods and technologies.

## CONCLUSION

"Sunny Beach" resort and the potential of the place for practicing climate, balneo and spa tourism, as an opportunity to change the image, is completely real. It can be said that the tourist offer is mainly aimed at marine recreational tourism. As a result, a super-intensive load is reported during the summer season, followed by stagnation during the remaining three seasons. The offer itself is of the same type in terms of attractions.

In recent years, the investments made were not small, and the process of infusing fresh capital was quite accelerated, and the modernization and adaptation to the modern requirements of tourist demand moved at a higher speed. This significantly increased the quality of the offered tourist product to meet the increased tourist demand.

However, the Sunny Beach resort has lost its former glamor and image, and its name is often found in the foreign press, mostly associated with low prices and quality, alcohol, noise and uncertainty. "Sunny Beach" resort is the destination of national importance and must fight for a higher prestige to try to bring back families, wider reference groups and more affluent tourists.

Possibilities are found in terms of the development of cultural-historical and religious tourism, due to the proximity to Nessebar; SPA tourism, since there is mineral water, and many of the hotels already have built-in bases, climate and balneo therapies, due to the presence of the

combination of sea, mountain and 8 arms with different currents, which create a unique ionization of the air.

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## SWOT ANALYSIS AS A DECISION-MAKING TOOL IN THE PROCESS OF IMPLEMENT BLOCKCHAIN TECHNOLOGY IN BULGARIAN ENTERPRISES

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### ABSTRACT

*Blockchain technology is among the most discussed innovative information technologies having the potential to transform the economics and business processes of the new era. Largely, the interest in the technology is a result of the impact of social media influencers. On the other hand, there is growing evidence of successful crypto projects, implemented in industries, generating a significant share of global GDP. Decision-making about implement blockchain technology in the business organization depends on economic and psychological factors, which are often not sufficiently objective. Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis, recognized for its applicability in all industries, is used as a relevant decision-making method. In the present study, the method in question will be used by making constructs whose influence is measured by regression analysis. The data used to construct the analysis were generated in the context of the Bulgarian economy.*

**Key words:** *blockchain technology, SWOT analysis, regression analysis, Bulgarian enterprises supply chains*

### INTRODUCTION

Blockchain technology (BCT) originated in 2008 as an online system for carrying out financial transactions using the cryptocurrency "Bitcoin" [1]. The genesis of the technology began in 2015 with the announcement of the second most used blockchain "Ethereum"[2], enabling the development of the so-called "smart" contracts. Nowadays, the smart contracts functions find application in all spheres of economic and social life. Good practices have been registered in the field of: decentralized finance [3]; digitized supply chains [4]; WEB 3 [5]; healthcare [6]; intelligent transport systems [7]; defense [8]; petrol industry [9].

The scalability of the BCT is the result of the advantages stem from the technology, namely: cryptographic data protection; distributed data storage; flexibility; independence; immutability; agnostics [10].

On the other hand, there are disapprovals associated with: negative opinions about cryptocurrencies; energy consumption; lack of regulations, etc.

Despite the reported pros of BCT, the limitations are factors, which have a strong impact in the decision to use the technology, especially for companies operating in developing economies such as the Bulgarian one. Since the practical-

applied research carried out in specific sectors is in the pilot phase, a relevant method for assessing the risks of the implementation of BCT is precisely the SWOT analysis.

Emphasis in the current article is placed on the use of the SWOT analysis when making a decision to implement BCT in the business organization. It uses data from a blitz survey conducted in the Bulgarian entrepreneurial ecosystem and receives real ratings obtained from company managers through a survey method, noting that the companies operate in the supply chain field.

### METHODOLOGY

The proposed model, analyzing the strengths and weaknesses of BCT, has the potential to be used in business practice as a relevant tool for evaluating the usability of the technology. In this way, the business organization adopting the innovation is able to make an informed decision about BCT implementation as part of its business development strategy.

In the course of the study, data obtained from earlier research is applied through an analysis of the strengths, weaknesses, opportunities and threats of the technology usage (SWOT) [11]. The "SWOT" analysis elements are constructs, and for each one, a corresponding motivator or

limiting factors is attributed. The obtained constructions are coded in the statistical tools "SPSS" and "R" to conduct the regression analysis.

The research aims to group the factors influencing the decision-making for the use of BCT in the field of supply chains (SC) of Bulgarian enterprises by using a "SWOT" analysis. To accomplish this task, the "philosophy" embedded in the concept of "central orthogonal positional planning" is used. In other words, each of the quadrants of the coordinate system will correspond to parts of the "SWOT" analysis. The categorization uses data from a survey conducted in the field of SC, in which the respondents indicated the reasons leading to the use of BCT (motivators), as well as the factors limiting the introduction of the technology (barriers) [12]. In this regard, the "motivators" are positioned in the first and fourth quadrants, therefore the "barriers" cover the second and third quadrants of the coordinate system. It is important to note that applied values are inherent to the influencing factors internal to the organization.

After underlying the main points, we proceed to the implementation of the overall concept of the analysis. The adaptation of influencing factors will be carried out by measuring absolute values, bypassing the relative ones obtained as a result of the aforementioned study [12].

*The first step* involves reviewing information about the most important influencing motivating factors, as well as distinguishing them from those of lesser importance. The rules according to which the selection will be made are:

- ✓ determination of a limit value for the "motivators", respectively the "barriers";
- ✓ grouping of opinions according to the obtained values (lower and greater than the limit value);
- ✓ adapting the factors to the respective constructs.

Applying the described principles, the motivators having a value above the mean ( $\geq 4$ ) should fall into the first quadrant, i.e. "area of absolute advantage". Motivating factors lower than the mean ( $\leq 4$ ) should be positioned in the fourth quadrant, namely: "area of possibilities".

Similar actions are also carried out for the "barriers". The limit's value for the limiting factors is the same as for the motivators, suggesting that indicators lower than "4" ( $\leq 4$ ) will be located in the second quadrant (threats), while those with higher scores ( $\geq 4$ ) will be located in third quadrant (weaknesses).

*The second step*, involves forming hypotheses to be confirmed or rejected by conducting the statistical analysis, namely:

- **H1:** The "strengths" of the technology do not influence the decision-making to use BCT in the company;
- **H2:** The "weaknesses" of the innovation do not have an impact on the use of BCT in business operations;
- **H3:** The "opportunities" stem from the technology do not affect the decision-making of the use of BCT;
- **H4:** The "threats", in relation with BCT, are not relevant when choosing the technology to increase the competitiveness of the enterprise.

Based on the described procedures, we proceed to *the third step*, namely: constructing the variables and performing the regression analysis.

## RESULTS AND DISCUSSION

The execution of the method begins with discovering the positively influencing factors (Table 1).

**Table 1.** Factors forming the constructs "strengths" and "opportunities"

Strengths and Opportunities	Mean „4”
Trade contracts risk prevention	4,49
Obtaining competitive advantages	4,43
The ability to use smart contracts	4,42
Low cost of technology implementation	4,39
Increasing the transparency, traceability and immutability of information	4,04
Improving the processes of delivery of goods	4,03
Reduction of intermediaries in trade processes	3,89
Digitization of supply chains	3,75
Increasing information security through decentralization storage	3,44
Reduce the cost of maintaining inventories	3,27
Interest in entering the ICO market	3,13
Protection of intellectual property	2,87

Cells marked in green with a value greater than ( $\geq 4$ ) form the "strengths" construct, respectively in red and lower than ( $\leq 4$ ) form the "opportunities" construct.

After applying the operation about the influencing motivating factors, a similar action is executed for the limiting circumstances regarding

the use of BCT in the field of supply chains. After the calculations, the data acquire the following arrangement (Table 2).

**Table 2.** Segmentation of the limiting factors

Weakness and Threats	Mean „4”
Negative opinions about the BCT (cryptocurrencies' volatility, dark side, etc.)	5
Lack of expertise in the company	4,77
Limited information infrastructure caused by the requirement for all participants to be “on-board”	4,74
Financial constraints	4,71
Lack of knowledge among clients about BTC	4,69
Sensitivity to sharing information in permissioned grids	4,46
Lack of cooperation and coordination between our partners for inclusion in Blockchain smart grid	4,34
Lack of a standard for rapid BCT integration	4,3
Lack of company and organizational strategies	3,84
Lack of interoperability with existing IT-Systems	3,75
Insufficient development of the BCT	3,19
The organizational culture would not accept the introduction of such a project	2,01

After selecting the influencing factors, the constructs, which will be analyzed using statistical tools, are created. The task involves performing a regression analysis. The steps are: conducting a reliability test; descriptive statistics; compilation of the regression model; analysis of distribution and residuals.

The creation of constructs based on a "SWOT" analysis is the starting point, and the first phase is the calculation of reliability for each independent sub-variable (Table 3).

**Table 3.** Reliability test of the sub-constructs

Reliability Statistics “strenghts”	
Cronbach's Alpha	N of Items
,726	6
Reliability Statistics “weakness”	
Cronbach's Alpha	N of Items
,729	8
Reliability Statistics “opportunities”	
Cronbach's Alpha	N of Items
,554	7
Reliability Statistics “threathens”	
Cronbach's Alpha	N of Items
,573	4

The values of the indicator are acceptable and meet the reliability requirements (Cronbach's Alpha  $\geq 0,5$ ).

The following operation prescribes analyzing the value of the determination coefficient, bringing out a relevant value of 0.271 (Rsquare = 27%, Table 4).

**Table 4.** Determination coefficient of the regression model

Model Summary <sup>b</sup>						
R	R Square	Adjusted R Square	Std. Error of the Estimate	Change Statistics		
				R Square Change	F Change	Sig. F Change
,521 <sup>a</sup>	,271	,242	,928	,271	9,120	,000
a. Predictors: (Constant), threats, opportunities, weakness, strenghts						
b. Dependent Variable: Planning and using blockchain technology						

For this purpose, a linear regression analysis is performed with the above-mentioned constructs, and first of all, the independence between the factors is required to be tested by the "collinearity test" (Table 6).

**Table 6.** Estimates of the constructions obtained as a result of "SWOT"-analysis

Model	Coefficients <sup>a</sup>						
	Unstandardized Coefficients		Standardized Coefficients	95,0% Confidence Interval for B		Collinearity Statistics	
	B	Std. Error	Beta	Lower Bound	Upper Bound	Tolerance	VIF
(Constant)	1,980	,726		,539	3,420		
Strenghts ( <b>Str</b> )	,092	,026	,395	,041	,143	,606	1,649
Weakness ( <b>Wks</b> )	-,012	,020	-,062	-,051	-,027	,720	1,389
Opportunities ( <b>Ops</b> )	,003	,023	,015	,042	,048	,629	1,589
Threats ( <b>Trs</b> )	-,091	,033	-,293	-,156	-,026	,669	1,495
a. Dependent Variable: Planning and using blockchain technology							

Indicators of independence between factors were greater than the benchmark (Tolerance  $\geq 0.5$ ), supporting their adequacy for inclusion in the analysis. The “VIF” indicator reports correct values ( $VIF \leq 10$ ).

On the other hand, hypothesis testing found that::

- ✓ **H1:** The confidence interval estimate of the independent variable “strengths” do not contain “0” in their values, confirming an alternative hypothesis (H1) stating that the strengths of the technology influence the attitudes towards the use of BCT;
- ✓ **H2:** In the confidence interval range presenting the independent variable "weaknesses", do not contains "0", which confirms an alternative hypothesis (H1) for the mentioned position, i.e. reflected weaknesses have a negative impact on the perception of BCT within the enterprise;
- ✓ **H3:** The independent variable "opportunities" does not contain "0" within the estimate of the confidence interval, confirming the alternative hypothesis (H1), which states that the resulting opportunities positively influence the decision-making process for the implementation of BCT in the company;
- ✓ **H4:** The independent variable confidence interval "threats" does not contain "0", confirming an alternative hypothesis (H1) stating that threats arising from BCT negatively affect the technology use.

The calculations performed to confirm the relevance of the research constructs created on the basis of the “SWOT”-analysis cover the necessary reliability criteria, deriving the following regression equation:

$$\hat{Y} = 1,980 + 0,092*Str - 0,012*Wks + 0,003*Opp - 0,091*Trs$$

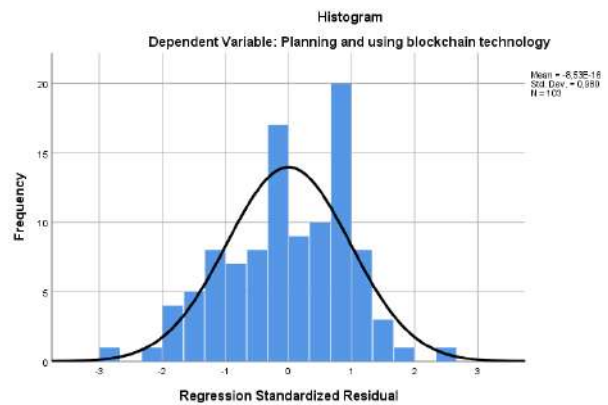
\*note:

- **Str** (Strenghts)
- **Wks** (Weakness)
- **Opp** (Opportunities)
- **Trs** (Threats)

In case standardized values are used, the regression equation will have the following expression:

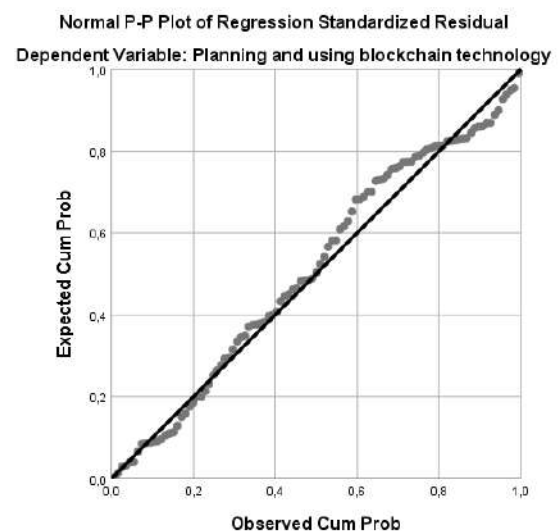
$$\hat{Y} = 1,980 + 0,395*Str - 0,062*Wks + 0,015*Ops - 0,293*Trs$$

For additional results verification, a histogram of the distribution (fig. 1) and a graph of the residuals (fig. 2) are presented.



**Fig. 1.** Histogram of residuals

The histogram reflects a normal distribution with a mean of 0 and a standard deviation of 0.980.



**Fig. 2.** Residuals positioned around the regression line

Regarding the standardized residuals plot, positioning around the straight line is considered acceptable. The figure shows that there are no heavy tails, which supports the adequacy of the regression model.

## CONCLUSION

In conclusion, it is appropriate to summarize the obtained results.

Regarding the SWOT analysis, the tool is confirmed as an applicable method for assessing the impact of motivating and limiting factors in making a managerial decision.

Applying the constructs obtained in the course of the calculations with the regression analysis, the expectations were confirmed that

the strengths and opportunities have a positive influence on the adoption of BCT in the enterprise. The BCT strengths include: trade contracts risk prevention; obtaining competitive advantages; the ability to use smart contracts; low cost of technology implementation; increasing the transparency, traceability and immutability of information; improving the processes of delivery of goods. The BCT opportunities are: reduction of intermediaries in trade processes; digitization of supply chains; increasing information security through decentralization storage; reducing the cost of maintaining inventories; interest in entering the ICO market; protection of intellectual property

Regarding the weaknesses and threats accompanying BCT, the negative impact on the decision-making to use the technology was confirmed. The BCT weaknesses includes: negative opinions about the BCT (cryptocurrencies volatility, dark side); lack of expertise in the company; limited information infrastructure caused by the requirement for all participants to be “on-board”; financial constraints; lack of knowledge among clients about BTC; sensitivity to sharing information in permissioned grids; lack of cooperation and coordination between our partners for inclusion in Blockchain smart grid; lack of a standard for rapid BCT integration.

On the other hand, the BCT threats are: lack of company and organizational strategies; lack of interoperability with existing IT-Systems; insufficient development of the BCT; the organizational culture would not accept such a project.

While blockchain technology is widely adopted by innovators in today's digitized world, it is appropriate to use proven techniques to evaluate the pros and the cons of each innovation.

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## BASIC INSTRUMENTS OF PSYCHODRAMA METHOD AS EFFECTIVE WAY OF THERAPEUTIC CHANGE AND PERSONAL DEVELOPMENT

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### ABSTRACT

*Psychodrama method, together with its instruments, represents valuable way of attaching human personal, family and group dynamics in order to organize a process and space for therapeutic change and personal development. Challenges in this perspective are to recognize specificity and influencing capacity of each of psychodrama instruments.*

**Key words:** *psychodrama, sociometrics, role, social atom, personal development*

### INTRODUCTION

Psychodrama is a group format of psychotherapy with deep roots in theater, psychology and sociology. Although preferably performed in a group format, it focuses on the particularities of the individual as the intersection of various relational roles, (e.g., being a son and a spouse) and roles related to difficulties and potentialities (e.g., fears, like fear of flying; or doubts, how the next job interview will be).

A psychodramatic session comprises of three contexts: social, group and dramatic; five instruments: protagonist, stage, auxiliary-ego, director, audience [Moreno, 1946/1993; Holmes, 1992]; and three distinct phases: warm-up, action, and sharing [Moreno and Moreno, 1975/2012; Holmes, 1992; Kipper, 1997].

The psychodrama method created by Moreno is popular in different countries of Europe and America. The use of its instruments causes effective therapeutic change and personality development in different areas of social life like mental health systems, education, social institutions, artistic spaces and psychotherapy setting.

### DESCRIPTION

Psychodrama method, which includes also group dynamics and sociometrics, has influence upon personal, family and group processes, offering in the meeting situation different aspects of the 11 consensual core techniques that are used mainly in the action phase of the traditional psychodrama session in contemporary Morenian Psychodrama.

The main objective of this study is to identify contemporary MP core techniques, as used in real clinical practice and to propose an updated definition to those MP techniques, which were consensually agreed by a group of international experts and certified trainers in this field.

### Soliloquy

Soliloquy is a technique brought by Moreno directly from classical theater where it had artistic aims [Moreno, 1946/1993]. It was described approximately in half of the revised texts (10 out of 20), and was one of the most consensual techniques in terms of its operability.

For Moreno [1946/1993], the “purpose is to be cathartic” (p. 245), and its “end is the knowledge of oneself” [Moreno, quoted in Cukier, 2002, p. 307]. The intention is for the protagonist to externalize the hidden feelings and “to reveal deeper levels of the interpersonal world” [Moreno, quoted in Cukier, 2002, p. 306]. “It allows correcting any misrepresentations of the scene, being valuable for the adaptation of the auxiliary egos and orientation of the director. If the dramatization ends in this way, one can obtain the 'insight' of the protagonist. The protagonist has the opportunity to change and integrate into action, what s/he expressed in soliloquy.

When the protagonist holds his/her action or becomes ambivalent, the director asks him/her to “think out loud” [Holmes, 1992], outside the dramatization dialogue, expressing what s/he thinks and feels in the here-and-now. Soliloquy

can also be performed as the protagonist walks the stage.

### **Double**

The double technique is considered by Moreno (quoted in Cukier, 2002, p.310), “as old as civilization. We find it in the great religions. I have often thought that God must have created us twice, one for us, to live in this world, and another for ourselves.” This technique is used to

- assist the protagonist in the expression of thoughts and feelings that, for some reason, s/he does not perceive or avoids expressing both verbally and bodily [Blatner and Blatner, 1988];
- support the protagonist to enter the dramatization more fully and deeply [Blatner and Blatner, 1988];
- test the director's interpretation of the protagonist's inner messages by means of an auxiliary ego
- be a vehicle to provide more effective suggestions and interpretations to the protagonist (Blatner and Blatner, 1988). By identifying with the double, the protagonist may gain insight. The double can also constitute a good warm-up for the auxiliary ego.

While the protagonist represents his/her own role, the auxiliary ego stands beside or behind him/her, adopts his/her body and emotional expression, and slowly adds the emotions, fears, motives, or hidden intentions that the protagonist is not explicit about [Holmes, 1992]. Therefore, the procedure requires corporal flexibility and telic sensitivity on the part of the therapist and auxiliary ego.

One can make subsequent or simultaneous doubles. This is useful when one wants to know the opinions of the group members regarding, for example, a dramatized scene. In turn, each element of the audience should place a hand on the shoulder of the protagonist and while doubling, will say what s/he feels from the role of the protagonist. This way of applying the double allows a minimization of the negative impact of feeling imitated.

### **Mirror**

Mirror as psychodrama technique can be applied in various ways, there were no significant disagreements regarding its definition. The purpose of this technique is to promote the awareness of the protagonist and his/her behavior in different situations. It is used when the protagonist does not perceive his/her behavior, and the image s/he transmits to others differs substantially from the image s/he has of him/her self (inter-

nal and external image. As Moreno conceived its aim is to transform the protagonist into a spectator of him/herself.

It can be applied in a variety of ways: in the dramatization, the auxiliary ego imitates the protagonist, standing in front of him/her, saying and doing what s/he does; once the dramatization is finished, the auxiliary ego reproduces what the protagonist dramatized while s/he observes from the audience [Moreno, quoted in Cukier, 2002]. An alternative option can be used, the “technological mirror,” which may rely on photography, cinema, video and audio recordings to achieve similar results.

This technique can be potentially uncomfortable and provocative for the protagonist. As such, it is recommended that a professional auxiliary ego is used to avoid the risk of the protagonist feeling ridiculed.

### **Role reversal**

Role reversal is one of the foundations of Moreno's theory and was the most common technique.

This technique allows the protagonist to obtain a more accurate perception of the individuality of the complementary role (López, 2005), as well as the possibility of perceiving the other's view about him/herself (Kellerman, 1994), and about the world (Holmes, 1992). It also allows a characterization of the characters so that the auxiliary ego learns the role (verbal and non-verbal component) that has been assigned to him/her. This warms up for the action so that the represented scene is as close as possible to the protagonist's experience [Blatner and Blatner, 1988].

In a dramatization, the protagonist is invited by the director to reverse with the other with whom s/he interacts, namely, the complementary role (hereby referred to as auxiliary ego). This auxiliary ego can be an element of the therapeutic team or an element of the audience. With role reversal, the protagonist places him/herself psychologically in the place of this other person.

### **Resistance interpolation**

The interpolation of resistances may be used to test the capacity of the protagonist to face a situation: when it is used unexpectedly, it will test the spontaneity of his/her response, while providing an opportunity to train his/her flexibility and discover new possibilities in face of an unfavorable situation. It can also be used to corroborate a diagnostic hypothesis: if the results



are not obtained, the hypothesis should be abandoned.

As a technique, it consists on the modification, by the director, of the scene presented by the protagonist. S/he presents his/her scene according to his/her point of view, based on an argument and certain expectations about its outcome. The director introduces modifications (e.g., modifies the characteristics of the dramatic context and/or the complementary roles) through indications to the auxiliary ego: introducing unforeseen factors that lead the protagonist to act spontaneously, revealing forms of behavior and personality. "An authoritarian character can become humble and submissive, an attentive individual can become deaf or distracted, a docile relative can become irascible" [Blatner and Blatner, 1988;p. 27].

### **Sculpture**

Very popular technique in the concept of Moreno's therapeutic images with three concepts: sculptures, psychodramatic images and therapeutic images. Moreno refers to therapeutic imaging as a "method that can be used with advantage [Moreno 1972]. The method of image activation is only a resource to assist to be spontaneous and further Moreno used the term, he referred to it as a mental image.

Blatner [Blatner1996, 1997] argues that sculpture is traditionally seen as a family therapy technique and is an adaptation by Virginia Satir of the psychodramatic technique action sociogram [Blatner, 1997]. Sculpturing have been also recognized as technique in the scope of family therapy. Some psychodramatists following a systemic perspective have been incorporating this technique into their work since 1990, considering sculptures as an expression of the binding structure of a system.

The objective of the sculpture technique is the observation by the protagonist, the director and the group, of the organization within his/her sculpture figure, the connections between its elements and the exploration of their meanings. This technique is used to deepen the knowledge of a certain material. When constructed by the protagonist him/herself, s/he "drags" his/her characteristics and, therefore, allows a quick access to his/her contents.

The protagonist is asked to construct a figure (with people or objects) that represents the material brought by him/her. The protagonist must choose an auxiliary ego to represent himself/herself. The starting point for its construc-

tion can be directly the mental image (for example, a dream, a fantasy, a memory), or a mental image corresponding to a word (e.g., "duel"), or a phrase (e.g., "I feel sunk"); it can be a construct elaborated to convey a state of mind (e.g., sadness) or a physiological process (e.g., hunger). From this first image, other images may be requested in a temporal line (before, after), other spaces (in parallel, in another place), contrasting values (better, worse, pleasant, unpleasant), reference points for improvisations that integrate several images (to invent a story, to tell a story), among others.

Usually, sculptures tend to be realistic and constructed with elements of the group, but they can also be symbolic and accomplished with both people and objects.

### **Social atom**

The social atom, referred to in 10 of the revised sources, is described by Moreno [1946/1993] as "the nucleus of all individuals with whom a person is emotionally related or at the same time related to it. It is the minimal core of an emotionally accentuated interpersonal pattern in the social universe. The social atom reaches as far as tele itself reaches other people. Therefore, it is also called the tele-range of an individual" [Moreno, 1992, p.289]. It is a technique of presentation of the protagonist through which s/he presents the significant others of his/her life, often used in initial interviews and diagnoses. The social atom provides an overview of the protagonist's interpersonal structure, revealing conflicts with significant people and providing themes for dramatization.

Family members and significant others are arranged in the scenario, represented by auxiliary egos and objects. Distances, positions and postures are important elements. The protagonist makes role inversions with each of the people represented. The reversal of roles with significant others reveals common interactions and the protagonist's understanding of them.

### **Intermediate objects**

Often described in modern psychodrama literature the concept is recognized as theoretical framework. It is important to mention that although this was not a concept of Moreno, the use of different objects was suggested and is part of all Psychodrama schools, and hence this was consensually considered as one of the MP most important techniques.

Objects such as props, fabrics, puppets, cloth dolls and masks have been recognized as catalysts of important non-verbal reactions and at the same time allow a greater distance from the emotionally charged situation [Blatner, 1997]. In its simplest form, it is an articulated doll that, through the voice of the director, “talks” with the protagonist.

The reestablishment of interrupted communication with the patient, replacing the direct therapist-patient relationship with object-patient, in order to facilitate the focus of attention and decrease alarm states.

When the patient does not respond to verbal communication, the professional auxiliary ego addresses the patient through the object (puppet, mask, hood, tunic); and based on the patient's reaction, the auxiliary ego can continue to use the object, or choose another object, or give the patient a similar object to interact with. When face-to-face communication is achieved, the object is eliminated.

### **Games**

Dramatic games were referred to in about a quarter of the revised references. The game must go through the same stages of the psychodrama session: warm-up, action and sharing.

There is a wide variety of games ranging from improvisation and character play to collective creation. The main objective is to provide an opportunity to freely express the inner world and externalize a fantasy through the representation of a role, or bodily activity. In the warm-up phase, games aim to raise therapeutic material to decide the theme of the session and/or the protagonist. Particularly useful to increase group cohesion, it strengthens the trust among the members, creates a relaxed atmosphere, resolves intra-group tensions, and changes the focus of a group that is constantly around recurring issues. Although they are play activities, they reflect personal aspects that can help the director to move from the game to the reality.

### **Sociometrics**

Sociometrics as basic component of the method concerns its conceptual diversity, which probably comes from the importance and comprehensiveness that it has assumed over time.

It has been considered as a scientific method to objectively determine the basic structure of human societies, as well as a method to measure interpersonal relationships [Blatner and Blat-

ner, 1988]. Its purpose is to help the elements of a group to provide mutual feedback on various issues [Blatner, 1997]. As a technique, it is used to measure interpersonal relationships [Blatner and Blatner, 1988;] regarding the criteria of interest to the researcher and how to warm up for group interactions [Blatner and Blatner, 1988]. It makes isolated people to stand out, making visible the pattern of the social universe [Blatner and Blatner, 1988].

Sociometric data can be obtained in writing: each element registers their choice of other members of the group according to the criteria presented by the director. The choices are all placed in a diagram or table and then the results are shared with the group [Blatner and Blatner, 1988]. They can also be obtained in action: by placing a hand on the shoulder of the selected person. This alternative is termed “sociometric action” because interpersonal choices are displayed in action, and used when immediate feedback is needed. After making the choices, there is room for confrontation and clarification among the participants.

### **Role training**

Role training aims to create situations for the development and training of a certain role in conditions very close to the real situation yet in a protected way [Blatner and Blatner, 1988]. It can be used as well as a diagnostic method (Moreno).

Essentially, “it consists of representing a role whose performance is feared, for example, that of a student during a next examination, or a role usually played poorly, such as the boss who does not know how to give orders and can be operationalized in two ways: the person is asked to play a role that is not normally theirs, or the person is asked to play his/her own part, but not in the setting in which it is normally played.

## **CONCLUSIONS**

Almost 100 years after its foundation MP still lacks theoretical and technical coherence within the international clinical community. However, techniques such as role reversal, sculpture, empty chair, and others can be used during a session points us to the importance and clinical relevance of the method. Therefore, psychodrama method shows creative and constructive potential for integration as supporting and personal developing tool in different public systems.

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## REFERENTIAL ACTIVITY ASSESMENT COMPONENTS AND THEIR POTENTIAL FOR UNDERSTANDING PERSONALITIES WITH PSYCHOTIC FUNCTIONING

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### ABSTRACT

*Referential activity is a central theoretical construct in psychoanalysis, in cognitive science and in developmental and clinical psychology. The assessment of referential activity factors provides a progressive method for systematically assessing the extent and nature of different levels of mental functioning, personalities change in psychotherapeutic process. It also extends our understanding of the nature of severe psychopathology and the different role that the affect has in schizophrenic.*

**Key words:** *referential activity, scoring process, concreteness, specificity, clarity, overall imagery, psychotic functioning*

### INTRODUCTION

Referential Activity (RA) is defined as activity of the system of referential connections between verbal and nonverbal representations, as reflected in language style. Nonverbal representations include imagery in all sense modalities, as well as representations of action, emotion, and somatic experience. The RA measures assess the degree to which a speaker or writer is able to translate such experience into words in a way that will evoke corresponding experiences for the listener or reader. The RA theory, and the measures for assessing this dimension, were developed in the theoretical context of a dual or multiple code information processing model, derived from current work in cognitive experimental psychology.

Level of RA may show both state and trait variance: i.e., changes in an individual over time as a function of external and internal events or more stable differences between people. The RA measures, including rating scales and objective measures based on quantifiable linguistic features, were designed to assess these variations. These measures may be applied to many different types of materials, including brief texts such as monologues, early memories, or TAT protocols, and long continuous texts such as psychotherapy or psychoanalytic sessions.

The RA scales have been developed to assess the degree to which emotion and imagery are expressed in words. The four scales used for rating RA are Concreteness, Specificity, Clarity and Imagery. The scales reflect standards derived from poetic and literary criticism, as well as psy-

cholingistic and cognitive experimental research, and represent an attempt to join these traditions. The measures are based on the features of expressive and evocative language, and their significance in different speech situations.

The rater forms impressions of the narrative material on four dimensions that reflect access to nonverbal representations and their expression in language. For all dimensions, the scoring is intended to apply to the manifest content of the text; no clinical inferences are required. In general, the Concreteness and Imagery scales measure the sensory characteristics of language; the Specificity and Clarity scales reflect its degree of articulation, focus and communicative quality. Concreteness and Specificity indicate to what degree these dimensions are present in the speech sample, (i.e., their quantity); the Clarity and Imagery dimensions may be seen rather as indicators of the effectiveness of the expressions for the reader (i.e., their communicative or evocative qualities).

All dimensions are coded on a scale of 0 – 10. The scale points represent averages of scores by experienced judges, formed and educated in the method clinical experts

The four dimensions are significantly inter-correlated for most speakers and most texts. They are understood as reflecting different aspects of the same general dimension of access to nonverbal, particularly emotional experience, as expressed in language, rather than as entirely independent dimensions.

### **Concreteness**

This dimension reflects perceptual or sensory quality; the extent to which verbal expressions refer to sensate properties of actual things or events or to anything that is experienced as sensation or feeling. This may include reference to imagery in any sense modality; somatic or visceral experience; or representations of motoric activity, i.e., any components of the nonverbal processing systems.

The dimension of Concreteness is orthogonal to the notion of concreteness as referring to primitive cognitive capacities; and is often but not necessarily associated with effective poetic expression. A high level of Concreteness in the manifest content does not rule out the possibility that abstract concepts are being expressed. Effective metaphors and other poetic expressions, which may evoke a complex range of associations and abstract ideas, would be judged as highly concrete on this scale. Ideas, would be judged as highly concrete on this scale.

### **Specificity**

A highly specific text is detailed and informative, refers to particular objects, persons, places, times; specifies precise quantities; describes the subject or object of the discourse, whatever that may be, in detail. It is possible to be specific in talking about many different types of material, including abstract as well as concrete contents; e.g., a person may tell exactly what he had for breakfast, or a logician may talk in considerable detail about the provisions of truth tables. For this scale, the degree or quantity of detail is important rather than the vividness of description, or coherence of presentation. It is important to distinguish quantity of specific detail from sheer quantity of speech. Wordy texts can be quite vague, and thus score relatively low on Specificity. Specificity might include details orienting the narrative in time and space, for example, telling a story with careful attention to when, where and in what order events occurred, as well as detailed introduction of the characters who figure in the narrative [Dodd & Bucci, 1987].

### **Clarity**

In general, the Clarity dimension may be understood as reflecting the speaker's awareness of the communicative intent of discourse; the degree to which the speaker appears to be aware, on some level, of the perspective of the listener, and to be attempting to bring the listener where she is. There are two separate components, *focus*

and *transition*, which the rater needs to keep in mind in scoring this dimension:

#### *Focus*

If you think of a person's narrative as a sequence of frames or "shots", the concept of focus concerns the clarity of the individual frame; the clarity of an image as seen through the language; the effectiveness with which the speakers' imagery, ideas or feelings, whatever they may be, come through the language. A clear narrative is well-focused; the outlines of the ideas or imagery as expressed in the speech are clean, not blurred or fuzzy.

#### *Transition*

The concept of transition refers to the signaling of the sequential connection between one frame and the next; the degree to which the speaker attempts to make sense of this sequencing, so that you can follow him. A text can be clear as to transition even if the speaker moves rapidly from one topic to another, and even if the topics appear manifestly unrelated, as in free association, if the speaker signals that she is making the move. In some cases, the transitions are signaled directly.

The Clarity dimension has generally been the most difficult for judges. The following additional guidelines cover some of the problems that judges often have with the Clarity scale, and some of the judgments that scorers need to learn to make, which may be addressed in training sessions:

- Texts can be rated as relatively high in Clarity, even if confusion, conflict or ambiguity are being expressed, if the expression of these feelings is clear (as illustrated in data point 5.00 above).

- Clarity does not refer to correct grammatical structure. A text may be rated as clear even if the speaker uses grammatically incorrect forms, or run-on sentences, rather than well-organized sentence structures, as long as the ideas come across. Remember that you are rating transcripts of spontaneous spoken language, and that such language may be communicative and clear even with grammatical lapses.

- Logical organization (as distinguished from correct grammar) may contribute to the transition component, and thus affect the Clarity score.

- It may help in scoring Clarity to evaluate the amount of effort it takes you (or you estimate might take listeners) to understand what the speaker means. If you need to work actively, and to make inferences, to figure out what the speaker is trying to say, or to fill in gaps, this suggests

a lower Clarity score. The score should not reflect whether you think you "know what she means", but whether the speaker has been able to do the work of communicating this.

• In some cases, e.g., when excerpts of a longer text, such as an individual utterance taken from a session are scored out of context, you may have to make a judgment as to whether the listener is likely to have knowledge that would make the communication clear, even if you don't have such information, and incorporate this perspective in your rating.

### **Imagery**

This refers to your overall impression of the vividness and effectiveness with which the speakers' language is reflecting and capturing imagery or emotional experience, in any sense modality. The rater judges the degree to which the experience is present and immediate for the speaker and likely to be experienced as immediate by most listeners. It may be helpful to use your own response as to the degree to which the contents of an utterance come alive for you; but it is also necessary to filter out idiosyncratic factors, e.g., associations to events in your own life that might influence the imagery that is evoked for you. We are trying to capture a dimension of language that is very qualitative, but also to give ratings that are likely to be similar for most native speakers. Vivid sensory impressions should be present to achieve a high Imagery score; the Imagery dimension is distinguished from Concreteness, the judge does not need to point to explicit sensory experience, objects or actions expressed in the text.

## **DISCUSSION AND APPLICATION**

The process of RA scoring in dimension of psychotic schizophrenic patients is problematic and challenging for clinical experts/ RA judges mainly because of high level of ambivalent texts and idea units in patients speech and reports. First research on this field in Bulgarian culture and language concludes that people with positive profile of schizophrenic symptoms represent more consistent sentences and linguistic units in comparison to those with negative symptoms profile.

### **RESEARCH CASE NARRATIVE**

“Very good, very hardworking, very hardworking, very modest, very naive! When my

father was in Libya and Iraq, she put up a winter shelter for the winter, she closed the jars, she boiled them, she did everything...! My mother was very modest, but now they started casting spells on her when my father died, not only on her, but also on me and my whole family...

When we were on Varshets, we returned and saw my daughter-in-law lying meekly with her nephews - they had raped all three of them!...

I was very sick - my blood was 60 to 0!

When my brother married a pure-blood gypsy woman and they took me away - my father worked as a construction worker at the hospital and my brother as an electrician and they knew all the doctors and nurses...”

/R.M, 45 old patients /

Assessment results:

The scoring process is organized by three clinical experts formed in the method of referential activity with independent positions as follows:

- The text is organized in three segment units according the sub-issues in the narrative.

1. Segment “Very good, very hardworking, very hardworking, very modest, very naive! When my father was in Libya and Iraq, she put up a winter shelter for the winter, she closed the jars, she boiled them, she did everything...! My mother was very modest, but now they started casting spells on her when my father died, not only on her, but also on me and my whole family...”

- Concreteness: 1 2 2 – 1,67

- Specificity : 4 3 4 – 3.67

- Clarity: 3 3 4 – 3.33

- Overall imagery: 2 3 2 – 2.33

- Summarized: 2.75

2. Segment “When we were on Varshets, we returned and saw my daughter-in-law lying meekly with her nephews - they had raped all three of them!...”

- Concreteness: 2 3 2 – 2.33

- Specificity : 4 4 3 – 3.67

- Clarity: 4 3 3 – 3.33

- Overall imagery: 4 3 4 – 3.67

- Summarized: 3.25

3. Segment: “I was very sick - my blood was 60 to 0!

When my brother married a pure-blood gypsy woman and they took me away - my father worked as a construction worker at the hospital and my brother as an electrician and they knew all the doctors and nurses...”

- Concreteness: 3 3 2 – 2.67
  - Specificity: 3 3 3 – 3
  - Clarity: 3 2 3 – 2.67
  - Overall imagery: 2 3 3 – 2.67
  - Summarized: 2.75
- Overall summarized scoring RA – 2.92

## CONCLUSIONS

Referential activity paradigm with its criteria – concreteness, specificity, clarity and overall imagery represent systematic way in qualitative research efforts and in details perspective of lacks and potentials in human mental activity. Pilot research in Bulgaria make efforts to differentiate specificities in mental capacity between schizophrenic patients with positive and negative symptoms profile. Referential activity represents valuable potential for recognizing possibility for symbolizing process and further to support planning and applying interventions to help personal, social and labor well-being for people with severe mental disorders.

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## ESSENCE OF SCAPULAR STABILIZATION IN THE TREATMENT OF IMPINGEMENT SYNDROME OF THE SHOULDER JOINT

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### ABSTRACT

*This paper describes the biomechanical movement model and kinematics of the shoulder complex. The primary role and primary importance of three-dimensional rotational movements and dynamic stabilization of the scapula in restoring full and painless range of motion of the shoulder joint after impingement syndrome is clarified in detail. Important findings are made regarding the selection of manual therapy techniques and means to strengthen the scapular stabilizers.*

**Key words:** *scapular stabilisation, impingement syndrome, shoulder complex*

### INTRODUCTION

Shoulder subacromial impingement syndrome and rotator cuff dysfunctions are among the most common diseases and causes of shoulder pain [12]. The competing demands on the shoulder complex for mobility and stability and the complex structural and functional design make it highly susceptible to dysfunction and instability. Impingement syndrome is a progressive orthopedic condition that occurs as a result of altered biomechanics and/or structural abnormalities. Clinical features include pain, limited range of motion, reduced arm strength, and limitation of daily activities. Deficits in motor control alter levels of muscle activation and reduce coordination between the glenohumeral and scapulothoracic muscles during overhead movements. Effective treatment is aimed at addressing the underlying causative factors that are identified after a complete and thorough functional assessment. Due to the multiple etiological and pathomechanical pathways for the onset of the impingement syndrome, treatment is based on an accurate classification of the disease to provide more effective therapy interventions targeting the primary abnormality.

Designing a proper kinesitherapy program is logically focused on the mechanisms of onset, symptoms, and nature of the dysfunction and requires the inclusion of methods to regain full glenohumeral range of motion, reform dynamic stability of the rotator cuff, and restore strength and local muscle endurance of the scapular stabilizers.

### Biomechanic of the shoulder complex

Biomechanical analysis of the shoulder emphasizes synchronized movement of the four joints: glenohumeral, scapulothoracic, sternoclavicular, and acromioclavicular.

Normal shoulder movement is considered a complex interaction between bony anatomy and muscle activity. The interaction of the static stabilizers (bony structures, ligaments and joint capsules) and the dynamic components (muscles of the shoulder joint, scapular stabilizers and muscles of the rotator cuff) makes it possible for the shoulder to be mobile and create a wide variety of movements. Any impairment in the function of the static or dynamic stabilizers can significantly reduce glenohumeral function [8].

Clinically, the function and biomechanics of the glenohumeral joint cannot be discussed in isolation. Normal glenohumeral motion consists of a combination of rolling and sliding that keeps the humeral head centered on the glenoid.

The glenohumeral joint occupies the necessary positions in space thanks to scapulothoracic motion, which in turn becomes possible through adequate mobility and neuromuscular function in the acromioclavicular, sternoclavicular, and upper thoracic joints. Adequate neuromuscular function of the scapulothoracic segment, thoracic position, and degree of thoracic kyphosis also determine scapular motion [7].

The scapula forms a stable base and its correct positioning, harmonious movement along the chest wall and its stability are critical for efficient and powerful execution of all glenohumeral movements and normal function of



the shoulder joint. Scapular movement is controlled directly by the scapular stabilizers.

The dynamic stabilizers of the shoulder complex are classified into two groups: rotator cuff and scapular stabilizing muscles. The main dynamic stabilizers of the glenohumeral joint are the muscles of the rotator cuff - m. supraspinatus, m. infraspinatus, m. teres minor and m. subscapularis, which act in co-contraction to position the humeral head in the glenoid.

Their role in controlling the direction, degree and quality of movement of the humeral head during upper extremity movements is necessary to achieve optimal shoulder function [5, 11]. The rotator cuff helps elevate the arm while compressing the humeral head within the glenoid fossa and therefore resists cranial translation of the humeral head due to deltoid activity [2, 3, 14].

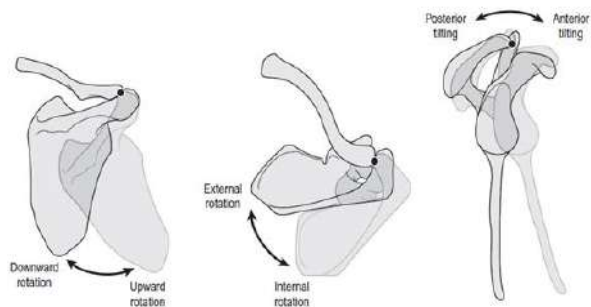
### Scapular stabilizers

Like the rotator cuff muscles, the scapular muscles also play an important role in adding dynamic stability to glenohumeral motion. Normal shoulder function requires smooth motion not only at the glenohumeral joint, but also at the scapulothoracic, acromioclavicular, and sternoclavicular joints.

Weakness, poor activation, and low endurance of the scapular stabilizers usually result in altered scapulohumeral rhythm. Because the scapula is attached to the ribcage only by the scapular muscles, the scapular stabilizers must have the activity, strength, and endurance to fix the position of the scapula to the ribcage so that the glenoid remains centered under the humeral head. This position is essential for the rotator cuff to perform its function competently in relation to the humeral head. Full elevation of the upper extremity requires three-dimensional rotation of the scapula and clavicle as a pair of motions in upward rotation, posterior inclination (tilt), and adequate internal or external rotation, depending on the plane of the moving humerus, ensuring that the coraco-acromial arch is displaced from the trajectory of the greater tubercle and will protect the underlying structures from potential impingement.

The scapulothoracic joint plays a critical role in ensuring proper positioning of the glenoid fossa, adding volume to shoulder elevation, and providing a stable base for controlled movements between the humeral head and glenoid fossa. Scapulothoracic movement is an integral part of almost any shoulder movement. Movement at the

scapulothoracic joint depends on the combined movements of the acromioclavicular and sternoclavicular joints.



**Fig. 1** Movements of the scapula in the acromioclavicular joint (From Neumann DA: Kinesiology of the musculoskeletal system: foundations for physical rehabilitation, ed 2, St Louis, 2010, Mosby).

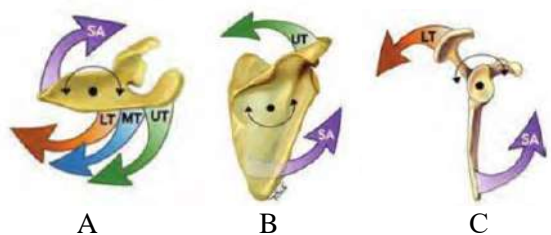
The main muscles that control the scapula are m. trapezius (the three parts), m. serratus anterior (upper and lower fibers), mm. rhomboidei, m. levator scapulae and m. pectoralis minor. These muscles work in a coordinated pattern called a force couple to coordinate the three-dimensional movement of the scapula.

The main upward-rotating force couple includes m. trapezius pars descendens, lower part of m. serratus anterior, with the stabilizing role of m. trapezius pars transversa et pars ascendens. Mm. rhomboidei and m. levator scapulae must be lengthened to allow sufficient upward rotation of the scapula. The posterior tilt includes the power couple m. trapezius pars ascendens /lower part of m. serratus anterior, and requires relative relaxation of m. pectoralis minor. Together with m. levator scapulae and mm. rhomboidei, m. pectoralis minor is considered to have more of a postural function, keeping the scapula stable on the chest wall during rest and movement. These three muscles are very often tense and shortened in patients with shoulder pain and need relaxation.

The third scapular movement, external or internal rotation, is controlled by complex power couples consisting of the two parts of m. serratus anterior against all three parts of m. trapezius. All three motions and their working force couples are represented in Fig. 2.

The role of the serratus anterior muscle for normal shoulder function is essential in many aspects. It is the only muscle capable of producing simultaneous scapular upward rotation, posterior tilt, and external rotation, the

three component movements of the scapula on the thorax that have been identified as occurring during arm elevation. M. serratus anterior also has the largest moment arms of any scapulothoracic muscle, regardless of the changing scapulothoracic axis of rotation. The serratus is the main stabilizer of the inferior angle and medial edge of the scapula relative to the thorax [5]. Decreased activity of the serratus anterior muscle has been identified in patients with impingement syndrome [6], further suggesting the importance of this muscle for normal shoulder function.



**Fig. 2** Force couples controlling scapular movements: A – external/internal rotation; B – upward/downward rotation C – anterior/posterior наклон (тилт); SA – m. serratus anterior; UT – upper trapezius/m. trapezius pars descendens; MT – middle trapezius/m. trapezius pars transversa; LT – lower trapezius/m. trapezius pars ascendens (From Brukner, P. & Khan, K. (2017). Clinical sports medicine - 5th ed).

Normal shoulder function depends on the ability of the scapula to produce sufficient upward elevation in the frontal plane and posterior tilt in the sagittal plane during elevation movements. In the transverse plane, the scapula may initially be internally rotated, but in end range it is externally rotated [8].

Abnormal scapular alignment and motion or scapulothoracic dyskinesia lead to clinical findings consistent with instability and/or impingement syndrome. Strengthening of the scapular stabilizers is an important component of the rehabilitation protocol following all shoulder injuries and is essential for full functional recovery of the shoulder complex.

In secondary impingement syndrome, the subacromial space narrows during active antigravity elevation of the arm due to dynamic glenohumeral or scapulothoracic instability [10].

The etiology of secondary subacromial impingement is primarily muscle imbalance and impaired motor control of the glenohumeral and scapulothoracic muscles and postural deviations

(increased kyphosis, head protraction, impaired mobility of the thoracic department) [10].

In all types of IM, scapular dysfunction can be a primary cause or significantly exacerbate the process with altered scapular kinematics [6, 13]. The limited upward rotation of the scapula, limited posterior tilt and its limited external rotation in abduction of the arm; increased cranial translation of the head of the humerus (most often as a result of weakness of the m. infraspinatus, m. teres minor) and anterior translation narrow the subacromial space and cause compression and damage to the subacromial structures.

For this reason, it is extremely important to work on passive and active correction of the position of the scapula - restoration of upward rotation, retraction and dorsal tilt. For this purpose, the application of kinesio taping of the scapula is suitable.

Indispensable techniques in the early stage of impingement syndrome treatment are the techniques for dynamic stabilization of the scapula and restoration of its control. Manual techniques allow direct interaction with the patient's scapula without causing excessive loading of the rotator cuff in the initial phase. A key point is the strengthening of the m. serratus anterior as the main muscle related to the posterior tilt and upward rotation of the scapula.

Activation of the power couple m. serratus anterior and of m. trapezius pars ascendens is imperative to provide the ability to rotate the joint angle of the scapula upward and stabilize it during arm elevation.

We offer a number of techniques starting with posterior scapular depression training against manual resistance and active exercises with end range hold. We begin the stimulation of these muscles with the PNF diagonal pattern for the scapula - "posterior depression" with manual resistance to retraction and its posterior depression (Fig. 3).



**Fig. 3** PNF diagonal pattern for scapula - posterior depression against manual resistance.



**Fig. 4** Scapular retraction.

It is also important to stretch the muscles that limit these movements - m. pectoralis minor are also added for m. pectoralis major, m. latissimus dorsi, m. trapezius pars descends through the application of stretching, autostretching and muscle-inhibitory techniques.

Then move on to resistive exercises against elastic resistance and free weight for the scapular stabilizers – mainly m. trapezius pars ascendens, mm. rhomboidei (Fig. 5), m. serratus anterior. Later - in a closed kinetic chain - supports on the wall, table and the ground. Rhythmic stabilization by pressure on a ball.



**Fig. 5**

Particularly important in strengthening rotators and abductors of the shoulder joint is to maintain retraction and posterior tilt of the scapula through manual control by the patient's thumb placed medially from the inferior angle of the scapula, while also preventing forward protraction of the humeral head ( Fig. 6).



**A** **B**

**Fig. 6** Abduction (A) and external rotation (B) against elastic resistance. The thumb of the other hand placed next to the lower corner of the scapula controls its stability.

Training of m. serratus anterior with elastic resistance - "bear hug" (fig. 7) protraction of the shoulder girdle (fig. 8).



**Fig. 7**



**Fig. 8**

Manual positioning of the scapula during the elevation of the upper limb in the correct position is of particular importance. Mobilization with movement techniques are also applied to eliminate pain during flexion and abduction of the arm and increase their volume (Fig. 9) - stabilization of the scapula to the thorax, posterior tilt and caudal mobilization of the humeral head are performed.



**Fig. 9** Mobilization with movement for the shoulder joint.

Closed kinetic chain exercises are included as a progression to improve scapular stabilization and co-contraction orientation and endurance training. It moves gradually from pressure on a ball on a wall or table to knee support and variations - with a gradual increase in weight bearing and a successive decrease in the number of weight-bearing limbs and on an unstable support. Rhythmic stabilizations are performed in the final range of motion. These exercises serve to stimulate joint mechanoreceptors and help restore proprioception (Wilk K.E. et al., 2001).

Many sports require the rotator cuff and scapular stabilizers to function in an eccentric mode of muscle action, which strengthens the argument for including eccentric training in the rehabilitation, especially of athletes with rotator cuff tendinopathy. Exercises should be performed in a controlled slow manner, avoiding the concentric phase to allow maximum loading in the eccentric phase.

## CONCLUSION

The role of kinesitherapy in restoring balance and dynamic musculature of the shoulder joint is undeniable, and a rehabilitation program based on biomechanical principles occupies a central place in the treatment of the entire spectrum of

impingement syndrome, as well as related disabilities. A key point is to overcome the disordered movement pattern of the scapula - restoration of posterior tilt, external rotation and upward rotation during elevation of the upper extremity.

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## THE IMPORTANCE OF PHYSICAL ACTIVITY FOR PATIENTS WITH CANCER

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### ABSTRACT

*Oncological diseases belong to the group of non-communicable chronic diseases. They often have a psychological impact, such as anxiety and depression, related to long-term treatment, side effects and the risk of complications. They are also among the most common socially significant diseases that lead to a reduced quality of life. Advances in medicine have increased survival and turned cancer into chronic disease that people continue to live with. Physical activity has positive effects on physical condition, mood, affects fatigue and anxiety. It is an important component in improving the psycho-emotional state of people suffering from these diseases and increasing life satisfaction. There is evidence for the role of physical activity in cancer prevention, control and survival, particularly in those diagnosed with breast and colon cancer. Physical activity is inversely related to cancer risk. The American Cancer Society (ACS) provides official guidelines for influencing physical activity in the direction of overall health promotion. The recommendations are aligned with the latest scientific evidence related to activity patterns, with particular emphasis on the social and physical environment. Moderate physical activity helps to avoid risk factors such as high blood pressure and cardiovascular diseases. Making healthy choices and turning the guidelines into feasible physical behaviors can be challenging for many people. These choices are made by particular people, and they can be hindered or facilitated by the communities and environments in which people live. A multidisciplinary approach is needed between public health professionals and fitness instructors for the benefit of patients with cancer.*

**Key words:** physical activity, oncological diseases

### INTRODUCTION

In recent years, continuous increase in the number of chronic non-communicable diseases has been observed. In addition to cardiovascular diseases, which are the number one cause of death worldwide, oncological diseases also deserve special attention. Cancer accounts for about 30% of all premature deaths from chronic non-communicable diseases in adults aged 30-69. Globally, there are approximately 15 million new cases of malignancies per year and more than 8 million deaths per year [1]. As a consequence, a number of other organs and systems suffer. Complications arise. The quality of life of patients significantly worsens. The purpose of this publication is to emphasize the importance of physical activity for patients with oncological diseases. To achieve the goal, the opinion of cancer patients was studied. It is necessary to form a new look at motor activity in order to form a health culture and behavior adequate to the needs.

### MATERIAL AND METHODS

Patients, men and women, aged from 46 to 71 years, with oncological diseases in outpatient settings were studied. All participants are without physical disabilities and limitations.

Medical documentation, a specially developed questionnaire and a set of exercises were used. The results were processed using Excel and SPSS.

### RESULTS

39 patients with oncological diseases participated in the study conducted in outpatient settings. All patients are in good general condition. The results show that a large proportion of all participants have poor movement habits and lead a sedentary lifestyle. Cancer patients usually have poor mental health. It is expressed in anxiety or depression caused by the diagnosis, the prognosis, the side effects of the therapy. Both sexes are equally anxious.

In patients with oncological diseases, the results are qualitative. They report improved self-esteem, desire to work, meeting friends and colleagues. There is evidence for the beneficial effect of participation in physical activity programs in breast cancer survivors. They also show a desire to change their behavior [2].

## DISCUSSION

Physical activity is useful for the prevention of certain types of cancer - of the breast, colon, kidney, endometrium, bladder, esophagus and stomach. Minimizing time spent in a sedentary lifestyle can reduce the risk of endometrial, colon and lung cancer [3]. Creating and encouraging a feasible daily exercise program is essential to break the vicious cycle of increased weight - increased inactivity - decreased activity - increased weight.

With the help of a national panel of experts, the American Cancer Society (ACS) develops and publishes physical activity and dietary guidelines to influence eating and physical activity patterns. The focus is on individual choices that are within a community context that can facilitate or hinder healthy behaviors [4].

In the different stages of cancer, physical activity plays an important role with its beneficial effects on fatigue, physical condition, mood, etc. [5]. Sometimes the implementation of a particular program may not be feasible due to lack of time or the specifics of the environment. So it is good to start with something simple to reduce the sedentary lifestyle, such as turning off the TV and reducing the time spent in front of the computer. Such an approach may be most effective at first.

## CONCLUSIONS AND RECOMMENDATIONS

Physically inactive people are at risk of type 2 diabetes, especially those over the age of 40. Therefore, adequate activity is mandatory to reduce the prevalence of developing type 2 DM among urban residents [6].

Regular exercise has various and significant health benefits.

To reduce the oncological risk, physical activity within 150 to 300 minutes of moderate intensity per week is necessary. Limiting sitting, lying down, watching TV and other forms of screen entertainment is also necessary. Adults

are advised to 'move more and sit less' because some activity is better than no activity [4].

Diet, physical activity and drug treatment are partners in the battle to achieve and maintain low-risk levels of blood sugar, lipids and blood pressure [7].

Health professionals need to individualize their approach when advising and supporting engagement in physical activity. The type of activity is much less important than deciding whether the patient should be active at all [8].

A multidisciplinary approach is needed, between public health professionals, health professionals and fitness instructors, for the benefit of cancer patients.

In order to create an effective team, skillfully made management decisions are needed to create a balance in the distribution of roles in the team. In effective teams, each member plays his or her assigned role, using his or her talents, knowledge, and skills to the best of their ability. When all members combine individual abilities and professional skills, synergy is achieved [9].

## CONCLUSION

Physical activity burns calories, which helps maintain a healthy weight and lower blood cholesterol and triglyceride levels in cancer patients. This lowers the risk of complications such as high blood pressure and cardiovascular disease.

If a person has cancer, more movement will contribute to physical health, mood and quality of life. Success requires patience, positivity, and persistence. This will ensure positive emotions, muscle and heart health, strong bones, reduced side effects and overall well-being.

Regular exercise reduces stress, one of the most common causes of both cancer and diabetes.

"Today is always the best day to make movement a part of your life."

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