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## THE BULGARIAN DIPLOMACY AND THE PROBLEM FOR THE SERBIAN ACCESS OF THE ADRIATIC SEA DURING THE BALKAN WAR

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### ABSTRACT

*This article aims to throw additional light upon the events of 1912-1913 related to Belgrade's goal of exiting the Adriatic Sea in the context of the great European policy. It presents the view of the Bulgarian diplomatic representatives - Andrey Toshev in the Serbian capital Belgrade, the plenipotentiary Minister Stefan Bobchev in St. Petersburg, the plenipotentiary minister in Rome Dimitar Rizov, the plenipotentiary minister in Vienna Ivan Salabashev and the plenipotentiary minister in Athens Pancho Hadjimishev.*

*The paper is based on various research on the subject, published documents and archive sources from the Central State Archives (CSA) were used to write the article.*

**Key words:** *Serbia, Bulgaria, Great Powers, First Balkan War, diplomatic actions, Adriatic seaside;*

### INTRODUCTION

The clarification and the real understanding of the events related to Serbia's adventurous outreach to the Adriatic Sea and their importance for the development of the Balkans and Bulgaria on a political level is a historical problem of undoubted significance, and various aspects of it are addressed in numerous studies in our native historiography.

At different times and on various occasions, the interest in the subject intensifies and then fades, but does not interrupt, fed periodically by newly discovered documents, or with the emergence and launching of new ones and interpretations of historical facts that are already known.

This study examines various aspects of the problem of the Serbian state of the Adriatic. They are related to the proclamation of Albanian independence, the relations between the countries in the Balkan Union, the course of the Great Powers from the two military-political blocks - the Entente and the Central Powers, the deepening of the contradictions between Belgrade and Vienna and the position of Bulgaria.

This article aims to further throw light upon the events of 1912-1913 related to Belgrade's goal of exiting the Adriatic Sea in the context of the great European policy. It presents the view of the Bulgarian diplomatic representatives - Andrey Toshev in the Serbian capital Belgrade, the plenipotentiary Minister Stefan Bobchev in St. Petersburg, the plenipotentiary minister in Rome

Dimitar Rizov, the plenipotentiary minister in Vienna Ivan Salabashev and the plenipotentiary minister in Athens Pancho Hadjimishev.

Various research on the subject, published documents and archive sources from the Central State Archives (CSA) were used to write the article.

In the Balkan War of 1912 - 1913, every one of its allies - Bulgaria, Serbia, Greece and Montenegro, among the general proclaimed goal - the liberation of Christian compatriots in the Ottoman Empire pursued its own strategic objectives. In the course of the military action, each of the Balkan states is trying to occupy more territories by creating a good starting point for their eventual accession to future peace talks. For Serbia, apart from the main operational area along the valley of the Vardar River in Macedonia, the offensive to the Adriatic Sea is southwest. In Belgrade, the acquisition of Adriatic Sea Exit as a realistic goal - even more so that it is not limited by official and secret arrangements within the Balkan Union. As it concerns the accession of Albanian-populated areas, the considerations highlighted by Serbian rulers are not ethnic but mostly economic. Serbian access to the Adriatic Sea is not subject to special consideration by the Union Treaty between Bulgaria and Serbia signed on February 29, 1912 secret annex to the contract detail indicates the dividing line between the two countries in Macedonia separating

the field of so-called. "Controversial" and "uncontested" zone. At the same time the remaining land that will eventually be won from Turkey, it is said only that "Serbia recognizes Bulgaria's right to the territory east of the Rhodopes and the Struma River and Bulgaria on Serbian territory north and west of Shar Planina". [1] The final wording unilaterally interpreted by Belgrade as accession and part of the Adriatic coast, will eventually become one of the main arguments for the request territorial compensation from Bulgaria.

However, the position of the Great Powers on the issue of the Serbian Adriatic access is far from unified. Moreover, it is a bipolar one, clearly outlined before the Balkan War. The Covenant states (Russia, the United Kingdom and France), albeit to varying degrees, favorably or at least neutral to the accession of Serbia to territories on the Adriatic coast. In Belgrade, they rely heavily on Russia, which increasingly favors Serb claims in the Western Balkans region. On the other hand, the Central Powers (especially Austro-Hungary and Italy, which are also in sharp competition with each other for influence in the region) are strongly opposed to the Serbian state's exit from the Adriatic.

In the course of the successful development of military action for Balkan allies, the issue of the Serbian Adriatic access is increasingly in the forefront. Serbian troops are quickly evolving in Albania and heading off the coast. They occupy Drach (Durazo, today Durrës), the most important Albanian city on the Adriatic.

With regard to the Serbian request to leave the Adriatic coast, the Bulgarian country is in a somewhat delicate situation. Bulgaria maintains and supports the Serbian claims, as an ally. Moreover, as an alternative to the Adriatic, the diplomatic circles of the Central Powers (aimed at aggravating the relations between the countries of the Balkan Union) are sometimes referred to the possibility of giving a Serb access to the Adriatic coast, which could not be done elsewhere except in Macedonia.

When it is clear that most of the Great Powers are reluctant to meet the Serbian demands, Russian Foreign Minister Sergei Sazonov calls on the Bulgarian government to influence Belgrade to withdraw its request for a port of Adriatic, through the Bulgarian legation in St. Petersburg (Plenipotentiary Minister Stefan Bobchev). "It is impossible to advise Serbia to give up an Adriatic port," Geshov writes. "Sazonov knows our agreement with her and will admit that we must

vigorously rebel against any violation of this agreement, what a violation will happen if, in order to fight us, some forces want to give Serbia an Aegean port. In no way can we accept that we will insist on giving Serbia an Adriatic port, so much so that Rizov telegraphs what in Rome they think that if not Durazo, then Medua or Alesio can be given to Serbia." [2]

Geshov's concerns are clearly apparent in the further correspondence of the government. On the same day (October 28th), explaining Bobchev's Bulgarian position in Petersburg, the prime minister also sent a telegram to Stoyan Danev, the Speaker of the National Assembly, on a diplomatic mission in Austria-Hungary. Geshov once again declared the government's support for Serbia's request. "Sazonov has charged Bobchev to telephone me," the prime minister said, "that the Triple Alliance decided not to give the Serbian Adriatic Sea a port and to advise Serbia not to have any demands. That for us, as you know, is absolutely impossible. If not Durazo, another Adriatic port, like Medusa or Alesio, as they thought in Rome, should be given to Serbia, and vigorously reject the idea of giving it an Aegean port. Let us understand what we should, as Serbia has telegraphed in Athens and Bucharest that it has solidarized with us, and that it will have the right to ask for us solidarity accordingly." [3]

However, Bulgarian own interests do not allow the unconditional support of Serb claims to the Adriatic. The solidarity position with which the official Sofia adheres, over time has become increasingly different from the general opinion of the Great Powers. Therefore, at a later stage, the Bulgarian government is content to receive up-to-date information on its issue from its diplomatic representatives in European capitals and to take a somewhat anticipatory behavior.

On October 31, 1912, with an encrypted telegram to Prime Minister and Minister of Foreign Affairs Ivan Evstratiev Geshov, Plenipotentiary Minister of Rome Dimitar Rizov handed over the position of the Great Powers on the issue of providing Serbian access to the Adriatic Sea. Rizov's report once again confirms the disagreement on this issue between the Entente and the Triple Alliance. D. Rizov's telegram shows even the most consistent supporter of Serbian claims - Russian diplomacy headed by Foreign Minister Sergei Sazonov. "Sazonov telegraphed the Russian ambassador: Russia is not against Albania's autonomy, independence or delegation, but is determined to support the access of Serbia on the

Adriatic Sea. The ambassador, who was entrusted with this opinion, asked the Italian Government how to look at the latter question. The Italian Foreign Minister replied categorically that Italy, as Germany, was determined to support Austria against the exit of [the] Adriatic Sea. "[4]

In a confidential letter dated November 2, 1912, the governor of Paris, Nikiforov reports to Prime Minister Ivan Geshov for talks with Russian ambassador Alexander Izvolsky on Russia's views on future territorial changes in the Balkans. "The recent diplomatic misunderstanding between Austro-Hungary and Serbia," says the letter, asking the latter to obtain an access on the Adriatic Sea, Mr. Izvolsky said: Austro-Hungary strongly insists that, in principle, satisfies the Serbian request. Italy says it approves of this view, and Germany, as their allies, supports them and is in solidarity with them. "

The diplomatic report from the Legation in Paris clearly differentiates the position of the two military-political groups (the Central Powers and the Entente to the issue of Serbian access). "On the other hand," says the letter, the Triple Army forces, finding Serbia's claim, they are supporting the Serbian cause, especially Russia is in the Serbian side and diplomatic order will try to satisfy Serbia, but at the same time the Russian government has already given Belgrade advice on moderation because it is not desirable to have such a relatively less important dispute that a European conflict will arise. "Nikiforov explains that the Covenant states are of the opinion that the problem should only be discussed after the end of the war. "Austro-Hungary will probably make some concessions, eventually allowing Serbia to make a certain access on the Adriatic." [5]

The fact that the Serbian troops occupied significant Albanian territories in the early weeks of the war and reached the Adriatic Sea quickly accelerated the moods for a lasting accession of these lands to the Kingdom. For Serbia, the opportunity to cut it off on the Adriatic coast becomes increasingly painful and unacceptable. The excessive hopes attributed to Russia are also largely unjustified. In order to avoid complicating the international situation and the potential of a pan-European conflict, the Slavic Empire succumbs to the pressure of the Central Powers.

On November 6, 1912, the minister in the Serbian capital, Andrey Toshev, sent a comprehensive confidential report to Prime Minister Geshov about this issue. Toshev is categorical: "The free Serbian access to the Adriatic Sea and

the question of the creation of an autonomous Albania completely absorbs today the public opinion in the Kingdom. On the one hand, the announcements made by St. Petersburg - that Russia is far from the thought of going all the way to the celebration of Serbian aspirations - filled the local political circles with bitter disappointment, so on the other hand, the aspiration of the Austro-Hungary has come to intensify, and without exacerbation, the existing Serbian hatred for the monarchy. The prominent minister is closely involved in the territorial aspirations of Belgrade. He explains that the Serbian Army has encountered virtually no resistance at the time of its advance, and thanks to the rapid mastery of large territories, Belgrade's territorial ambitions have grown enormously. "Confident on the eve of the war in its exodus to the Adriatic Sea of Albania's account," the Bulgarian diplomat writes, "Serbia has felt even more certain in its final success, encouraged by the easy victories of its weapon, which, besides Kumanovo, did not meet no serious resistance ". The Albanian state-designed Great Powers, however, cut off Serbia's path to the Adriatic Sea, which caused debauchery among ruling circles. The fears of the uncompromising and even threatening behavior of Austro-Hungary, which strongly opposed the idea of a Serbian sea outlet, were especially strong. Serbian limited benefits were seen by Belgrade's government amid a major territorial expansion of Bulgaria and Greece. There were different endpoints. The most militant belligerents in Belgrade's political circles argued that Serbian troops should occupy the whole of Albania in advance "and thus put Europe at the mercy of a reality." Then, even with the calls to leave the captured province, Serbia could dictate the conditions for its future borders. Toshev makes the point that, largely, these public statements have been aimed at stepping up Russia's policy and making it more resolute in support of Serbian territorial aspirations to the Adriatic. "As far as Bulgaria is concerned," said the proxy minister, "it is obvious what the Serbs rely on by their above tactics to tell us that if we do not give them our most energetic assistance at the time, they may be forced to embrace one a policy incompatible with the Bulgarian interests. " To these propaganda tactics should be added the recent speeches by Minister Jovan Jovanovic and Prime Minister Nicolas Pashic that "the victorious Serbian troop has met with great excitement the attempt to thwart the conquest of part of the Adriatic coast." According to Toshev, as it is true

that Austro-Hungary, and Germany and Italy "intrigued, in order to distrust and compete between Bulgaria and Serbia by inviting the latter through the valley of Vardar to Thessaloniki", so should be taken into account the fact that Serbia strives "to influence and not to leave it in its pursuit of the Adriatic Sea if we do not want to intertwine the affairs in Southern Macedonia." [6]

Serbia's striving to come out on the Adriatic Sea was also commented on by the plenipotentiary minister in Vienna, Ivan Salabashev. In an encrypted telegram to Geshov from 15 November 1912, I. Salabashev reported on his conversation with Foreign Minister Count Leopold Berchtold on the military political situation in the Balkans and the new situation that emerged after the allies' decisive successes.

The conversation concerns issues regarding the future division of the territories gained. On the issue of possible Serbian access to the Adriatic, Count L. Berchtold is infinitely frank. He categorically tells the Bulgarian diplomat that it is not possible to admit Serbia to the Adriatic Sea - either by annexing part of the Albanian territory or in the form of its own port, "because with the emergence of new forces the situation in the Adriatic Sea changed to the detriment of Austro-Hungary ". Vienna was only willing to provide free use of Serbia to some ports in Dalmatia, Montenegro or Albania. The Austro-Hungarian Plenipotentiary Minister in Belgrade has lectured Nicholas Pashic verbally on the issue of the monarchy. The Serbian Prime Minister gave an evasive response, not committing to whether his country would accept this proposal. According to Berchtold, "Austro-Hungary is not opposed to Serbia going to Durazo for a purely military purpose, but only temporarily for the duration of the war." [7]

Two days later, on November 17, Ivan Salabashev again sent a report to the Prime Minister. In it, the Central Committee's negative opinion on the Serbian request for an Adriatic outpost is even more pronounced. "I saw the German ambassador today," said I. Salabashev. - He said all the Great Powers were agreeing on Albania's independence. Austria would in no way allow Serbia to have its own territory on the Adriatic Sea, for which purpose Austria was resolved to lead war, if necessary. Russia was very correct. Sazonov said he finds Austria's point of view as right and reasonable. Serbia knew this, but personally instigated by Hartwig, [8] the country believed that, as a war with Austria began, then Russia would be forced against its will to inter-

vene in the war. Now Serbia has been a bit more peaceful, but the danger has not yet passed. "[9]

Despite the negative attitude of the Great Powers, in the first half of November 1912, the Serbian request for access to the Adriatic Sea (through the Albanian territories) was openly raised at the beginning of the negotiations to sign a truce between the Balkan Union and the Ottoman Empire. On November 3, Prime Minister Ivan Evstr. Geshov informed King Ferdinand (as a supreme commander) with an encrypted telegram about the possible preconditions of the other allies. "As for Serbia," the prime minister said, "he will probably want the surrender of Bitola, Debar and Drach. However, a final answer will be given tomorrow. "[10] The next day, the Prime Minister again sent a telegram to Ferdinand, announcing the final version of the preconditions that Bulgaria and the allies intend to bring to the Ottoman Empire. Regarding Serbia's claims, the telegram states: "The Serbian conditions for the ceasefire are that Bitola, Debar and Durazo should surrender. The Armistice has been agreed to be signed by Bulgaria in the name of the Allies. "[11]

The strained and tense relations between Belgrade and Vienna, mainly in connection with the possible granting of Serbian access to the Adriatic Sea, have also been addressed by the plenipotentiary minister in Athens Pancho Hadjimishev. In a confidential report to Ivan Geshov from mid-January 1913, the Bulgarian diplomat assesses the threatening behavior of the Habsburg Empire before Serbian demand to be rejected as a means of pressure on the other Great Powers. In front of Geshov, Hadjimishev commented on the announcement of the mobilization announced by Austro-Hungary and the various interpretations that this action provokes among the representatives of the diplomatic corps. "As everywhere," says the Bulgarian diplomat, "and here we all ask ourselves: what Austria actually means with its mobilization and our desire to defy its true intentions is a real" puzzle ". According to Vienna's well-known foreign policy, "Austria has no intention of invading Serbia, neither now nor in the spring or later. Mobilization pursues the aim mainly of providing wider borders to Albania to the detriment of Serbia, even to the detriment of Greece. And because they say in Vienna they are convinced that none of the Great Powers will risk the war for a port on the Adriatic Sea, or for Shkodra, Ipek and Gjakovo, Austria, through its mobilization, will succeed in imposing its will on Europe! "[12]

By the end of prolonged military action and during the lengthy peace talks in London, the Bulgarian government has been trying to support the Serbian request for access to the Adriatic coast. Geshov's cabinet and Prime Minister personally have every reason to fear that the cut-off of the Serbian access to the Adriatic will also affect the Bulgarian-Serbian alliances. In this respect, they are right. Following a series of unofficial steps and suggestions in this respect, on 12<sup>th</sup> May 1913 Serbian Plenipotentiary Minister in Sofia Miroslav Spalajkovic made a formal note on the revision of the Alliance's treaty. Among the main arguments cited in the document is that as long as Bulgaria has expanded unhindered to the East in Thrace, including Edirne, the Serbian request for access to the Adriatic coast was rejected by the representatives of the Great Powers. The note is characterized by a tendentious and manipulative interpretation of bilateral arrangements. It views the generalized term "west of Shar Mountain" contained in the Allied Treaty, including explicitly the Albanian Adriatic coastline. That is why it says that, unlike the huge and unimpeded expansion of Bulgaria, "The Great Powers are taking away from Serbia the most important part of its undisputed territory and giving it to Albania." Based on several points, Serbia is pushing for territorial compensation. Further, the note also mentions the demand for "a share of territory as a compensation for that undisputed territory that Serbia loses to the west, along with the entire Adriatic coast." The document further stresses: "Of all the sacrifices Serbia has borne out of the treaty and in the common interest in the course of this war, one of the worst is that it was forced by the Great Powers to give up definitively from its most important territory west of the Shar Mountains to the Adriatic coast, which territory was a vital issue for Serbia and therefore the main reason for which it participated in the war. By sacrificing its way out of the sea, Serbia sacrificed even the most important condition for its economic independence, thus saving both European peace and the allied enterprise against Turkey from a general catastrophe, and Bulgaria secured not only

its entire undisputed territory but also Thrace ". In its final passages, the note sums up the Serbian side's reasons for revising the Alliance: "Since Serbia was thus deprived of the ultimate condition for its full economic independence, it now rightly puts demands to secure it through a fair distribution of southern territories a more favorable position for its future economic existence and development. "[13]

Although without much enthusiasm, during the Balkan War of 1912 - 1913 Bulgaria supported the Serb territorial claims for the Adriatic Sea. The behavior of the Bulgarian government is governed not so much by allied solidarity. In Sofia they realize that the rejection of Serbian demand will be Belgrade's additional argument for seeking new territorial acquisitions in Macedonia. Unfortunately, the concerns in this regard of the Cabinet of Ivan Geshov appear to be well founded and reasonable. The decision of the Great Powers not to allow Serbia to the Adriatic Sea is among the main reasons cited as a ground for revising the secret clauses of the treaty with Bulgaria. Stripped in the West, the Serbian state finds the formal occasion to retain permanently the parts of Macedonia occupied by it, extending far beyond the so-called "controversial zone" agreed with Bulgaria.

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**THE WAY TO THE ESTABLISHMENT OF THE ALBANIAN STATE  
AND THE BULGARIAN DIPLOMACY (1912 - 1913)**

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**ABSTRACT**

*This study examines various aspects of the problems related in one way or another to the declaration of Albanian independence. Some of the problems are the Serbian country's aspirations for the Adriatic, the relations between the countries of the Balkan Union, the course of the Great Powers of the two military-political blocks, the Entente and the Central forces, the deepening of the contradictions between Belgrade and Vienna as a result of the failure of Serbian claims for territorial expansion in the West, Bulgarian position and others.*

*Various research on the subject, published documents and archive sources from the Central State Archives (CSA) were used to write the article.*

**Key words:** *Albania, Balkans, Great Powers, Serbia, Bulgaria, First Balkan War, diplomatic actions, diplomatic representatives, Adriatic seaside.*

**INTRODUCTION**

The clarification and understanding of the events related to the proclamation of an independent Albanian state of the sea and their importance for the development of the Balkans and Bulgaria on a political level is a historical issue of undoubted significance, and various aspects of it are examined in numerous studies in our own historiography.

At different times and on various occasions, the interest in the subject intensifies and then fades, but does not interrupt, fed periodically by newly discovered documents, or with the emergence and launching of new ones and interpretations of historical facts already known.

This study examines various aspects of the problems related in one way or another to the declaration of Albanian independence, such as the Serbian country's aspirations for the Adriatic, the relations between the countries of the Balkan Union, the course of the Great Powers of the two military-political blocks, the Entente and the Central forces, the deepening of the contradictions between Belgrade and Vienna as a result of the failure of Serbian claims for territorial expansion in the West, Bulgarian position and others.

This article aims to further throw light on the events surrounding the announcement of independent Albania and the eradication of the Serbian outpouring of the Adriatic, which gives Belgrade the formal occasion to permanently retain

the parts of Macedonia occupied by it, extending far beyond the so-called "controversial" zone.

Various research on the subject, published documents and archive sources from the Central State Archives (CSA) were used to write the article.

\* \* \*

The Albanian state was created as a result of the radical territorial changes that took place in the course of the First Balkan War (1912-1913). Its origin was, however, a result of the intervention of the Great Powers in the region, mainly those belonging to the Triple Alliance. Both Austro-Hungary and Italy have firmly taken the view of creating an Albanian one that balances and opposes the countries of the Balkan Union (which, in addition to the anti-Turkish one, also has anti-Austrian orientations). At the same time, the Albanian state was considered (especially in Vienna) as a future protectorate and a means for more active and even dominant influence in the Balkans.

The emergence of the new state is not included in the plans of the majority of Balkan allies. Serbia, Greece, and Montenegro have openly declared claims to acquire territories with predominant Albanian population. Only Bulgaria's attitude is more moderate, but it must show solidarity with the position of its allies. On the other hand, the excessive expansion of the future Al-

banian state (the so-called Greater Albania), as outlined in the projects of the leading Albanian political factors, would affect a considerable part of the lands that Bulgaria considers to be its own. It is primarily about vast parts of Western Macedonia, populated with both Albanians and Bulgarians. This has led Bulgarian diplomacy and the governors to be particularly careful in addressing the issue of the territorial scope and boundaries of the projected Albanian state.

Bulgarian diplomats (having the rank plenipotentiary ministers) in the capitals of major European countries periodically inform the government about the intentions of the Great Powers on the state-political structure of the Albanian lands. The ministers in Vienna and Rome are the most active, since Austro-Hungary and Italy have taken a firm and clear stance on the creation of the Albanian state since the war began.

In mid-November 1912, the plenipotentiary minister in Vienna, Ivan Salabashev, spoke with Count von Leopold Berchtold, the Foreign Minister of Austro-Hungary. For the meeting, Salabashev immediately informed Prime Minister and Minister of Foreign Affairs Ivan Evstr. Geshov. In the course of the conversation, Berchtold takes up all key issues related to the current military-political situation in the Balkans. "There was neither an ultimatum nor a note on the Albanian question; it was not true that Austro-Hungary was waiting for a response from Serbia now, according to Salabashev. - Austro-Hungary and Italy have agreed to ensure [the establishment of Albania] with or without independence; it was not possible to allow Serbia to annex part of Albania or to have its own port on the Adriatic Sea" The report of the Bulgarian Plenipotentiary minister in the Austro-Hungarian capital is a clear sign that the Triple Alliance states are ready to firmly support the view of Albania and rejecting Serbia's admission and access to the Adriatic Sea - a corridor only possible through Albanian ethnic territory. [1]

On November 2, 1912, the governor of Paris, Nikiforov sends a confidential report to Prime Minister Ivan Geshov for a conversation with the Russian Ambassador (and former Foreign Minister) Alexander Izvolsky. The main topic of the talk is Russia's opinion on the future territorial changes in the Balkans. The theme for Albania is also affected. Interestingly, Izvolsky recommends the Balkan allies a moderate behavior and recommends in no way to oppose the New Country project. The Bulgarian diplomat relayed the words of his Russian counterpart almost verba-

tim: "But as far as Albania is concerned, Austro-Hungary insists on creating an independent Albanian principality, and I do not believe," says Izvolsky to step back from this point of view. But in this respect, continue Mr. Izvolsky, the Balkan states should give way. Cultivation and internal consolidation of Albanian lands is associated with great moral and material difficulties; the population there is not prepared for a free life, so it is hardly in Serbia's interest to want to take on such a delicate and difficult mission, accompanied by the spending of large sums that Serbia can hardly obtain. In view of this, it would be best, says Mr. Izvolsky, Serbia and the other Balkan states not to oppose the creation of a separate Albania. "At the same time, Izvolsky also expressed Russia's position that the new state should be in minimal and even "cut borders". Therefore, the advice of the Russian Ambassador is not unusual: "In defining the boundaries of such an Albanian state, the Balkan states are free to watch on preserving their true territorial interests by striving to push the territory of a future self-governing Albanian principality to the ultimate minimum ". [2]

In November, the military action between the Balkan allies and the Ottoman state was temporarily suspended. After an armistice, talks begin in London to sign a peace treaty. During the first meetings, however, the Turkish delegates are not inclined to accept most of the allies' demands.

On December 15th, 1913, the first Bulgarian delegate in London, Dr. Stoyan Danev, informed Prime Minister Ivan Evstr. Geshov for the intolerance on behalf of the Ottoman delegation participating in the London Peace Conference. Along with the suggestion that the Edirne district remain in Turkey, and that Macedonia form itself as an autonomous region, but within the empire, the Ottoman representatives offer Albania to remain under Turkish sovereignty, being ruled by an Ottoman prince. Danev said, "I said that this proposal was unacceptable, nor even as a basis for debate and I suggested to the Ottoman representatives to say whether the proposal is their final word or not. In that case, we will have to present a new proposal to the next meeting ... "[3]

The question of the borders of the future Albania in the London peace talks is intertwined with the ever more striking rivalry between the Balkan allies themselves - mainly between Bulgaria on the one hand and Serbia and Greece on the other. On January 9, 1913, Stoyan Danev sent an encrypted telegram to Geshov, which is

indicative of the concerns and attitudes of the Sofia government. The head of the Bulgarian delegation in London insists on the elaboration of a Bulgarian project on the territorial scope of the Albanian state. "Because the Greeks, Serbs and Montenegrins have written memoirs to the ambassadors relative to the borders of Albania," Danev said, "in which case, some of them, especially the Serbs, have run into our field completely unceremoniously, and we can justify, in a separate memoir, our opinion on the Bulgarian-Albanian border from Korcha to Shar Mountains. From a formal point of view, we will populate and make an issue of the Albanian memoir (for Greater Albania, including Western Macedonia - USP), and we will actually answer, albeit indirectly, to Serbian aspirations, which are about Ohrid, Prespa, even Prilep" According to Danev, the Bulgarian memoir is unlikely to be decisive in defining the Albanian borders at the Great Powers Conference, but "we cannot leave out the obvious Serbian remarks, especially when the Austrians tell us that if we do not give them a word that we want to keep Ohrid and Struga for us, they will include them in the borders of Albania." The first Bulgarian diplomat in London states that the Bulgarian position should be moderate and balanced - "in any case, we will be extremely careful in form, on the one hand, noting the disagreement with our allies abruptly, especially as the negotiations with Turkey and Romania are on, and on the other, by avoiding having the view to appealing to the Great Powers to deal with matters which, in our view, are not and cannot be of their competence. "[4]

Russia's advice to the countries of the Balkan Union to be moderate on the issue of Albania's future borders is not accidental. St. Petersburg's propensity to compromise on the Albanian question is primarily caused by fears that it may further complicate the Austro-Russian controversy and, more generally, lead to an open conflict between rivalry between the Entente and the Triple Alliance. The worries of the Slavic Empire on the behavior of Austria-Hungary are evident in the reports of the Bulgarian diplomatic representatives. On January 27th 1913, the Plenipotentiary Minister in St. Petersburg, Stefan Bobchev, informed Prime Minister and Foreign Minister Ivan Geshov for the talks of Russian Foreign Minister Sergei Sazonov with the Austro-Hungarian emperor Count Hohenlohe. "For the mission of Hohenlohe Sazonov told me that in his letter, Franz Joseph claimed the most peaceful and friendly attitude. Both from the

letter and from his talks with Hohenlohe, Sazonov had the impression that there was no real mobilization in Austria that the military reinforcement was not against Russia, but was imposed by the circumstances, especially from Austria's fear of the border of Bosnia and Herzegovina. Austria does not want a war with Russia, the more it is known that Germany is against any kind of military entanglement and is not too willing to help Austria. „From the talks between Sazonov and Hohenlohe, it is also clear why Vienna is so insistent on the creation of a large Albanian state. "Austria is very much in favor of a possible vast Albania," says Bobchev, "as the last corner of the Austrian political influence on the Balkan Peninsula. Hohenlohe has never hidden that Albania is a shield against the southern Slav invasion. "[5]

A new angle and a point of view on the creation of Albania and its future borders is given by the plenipotentiary minister in Athens Pancho Hadjimishev. The main concern of the Bulgarian diplomat is how the creation of the Albanian state will reflect on the Bulgarian-Serbian and Bulgarian-Greek alliances. In a confidential report to Prime Minister Geshov from March 18, 1913, Hadjimishev described the conversation he had with his Serbian counterpart, Boskovic. "When Mr. Boskovic," writes Hadjimishev, "the current Serbian Plenipotentiary Minister, comes to congratulate me on the capture of Edirne, we talked about the last decision of the Great Powers to give Dyakovo to Serbia, and Shkodra to Albania, mentioning what I had heard from the horse's mouth, that Albania's future frontier will run along the Drin River, rather than the Serbs wanting it on the Drin River, a few miles west of the river itself. Mr. Boskovic missed the opportunity to complain of this unrighteousness, since establishing the border along the course of the river will force them to hold a whole army corps in the future to keep this unnatural border against Albanian invasions and raids".

In the informal meeting between the two diplomats, Hadjimishev frankly expressed the prevailing opinion among Balkan allies about Albania's future political destiny. "I replied to my colleague," continues the minister, "that the creation of Albania is a temporary thing and that in the near future they will take that side as long as I do," I continued, taking care to emphasize my thought, "that our alliance would remain a robust "unity" for the future, too!

I added that I am personally inclined to believe that the alliance will remain, because the



current governing circles in Athens, Belgrade and Sofia are sufficiently visionary to see that our common interest requires us to remain united for the future too! "Pointing out as the main the priority of preserving the Balkan Union, Hadjimishev explains why he has followed this behavior during the conversation: "I wanted to talk in this concealed form to show my own colleague that they most need us for future, because he is one of the ranks, if I can articulate it this way, together with Mr. Koromilaas (the Greek Foreign Minister, MP), about the formation of the Greek-Serbian alliance in the midst of our fourfold Balkan Union [...] By the middle of December, when the conference the ambassadors in London decided on the question of the creation of an autonomous Albania, I had the concern to telegraph you that, as both Mr. Koromilaas and Mr. Boskovic, spoke to me of the urge and the need for Serbia to "change the basis" for the division between us and Serbia, because through the thus-established Albania, Serbia was greatly damaged! From there, I think, the idea of a Serbian-Greek alliance against us is being initiated, under which, at one moment, the two governments will want to exclude us from the territories west of the river Vardar, by agreeing in advance on their common border between the Ohrid Lake and river Vardar! "

Unfortunately, the Bulgarian diplomat's forecasts prove to be true. As evidenced by his extensive confidential report, in the appearance of the Albanian state, Hadjimishev sees not only a formal argument for Serbia's ever-increasing demands to revise the secret territorial clauses of the Alliance with Bulgaria (splitting Macedonia into "controversial" and "indisputable "Zone"). The plenipotentiary minister perceived the overall situation around Albania as a prerequisite for shaping a Serbian-Greek Union directly directed against Bulgaria. Sharing his suspicions, the diplomat concludes: "I have no positive data to claim that this alliance or agreement has already been concluded, but as I have already telegraphed, I am inclined to believe in its existence, or at least that negotiations are being held between the two governments, to make such an agreement! And I am convinced that Mr. Boskovic is - together with Mr. Koromilaas - the initiator of this idea, because they both hate us equally, equally fearing by our overwhelming, in their view, strengthening, equally emphasizing the need for a certain "equilibria", i.e. not to allow that Bulgaria become stronger than Greece and Serbia taken together ... "

Pancho Hadjimishev's concluding remarks leave no doubt about the nature of relations within the Balkan Union. "Knowing perfectly those "so sincere" feelings about us to Mr. Boskovic," wrote the plenipotentiary minister, "I wished and took advantage of the first case he gave me, to point out only to what danger Serbia is exposed to, if it separates us from us, because I am convinced that an agreement between us and Austria will be enough to erase Serbia from the map of Europe when we want it! " [6]

The issue of the Albanian state remains an indispensable part of the conduct of the negotiations in London. On March 27th, 1913, the plenipotentiary minister in Berlin, Ivan Stefanov Geshov, with an encrypted telegram to the prime minister, announced the decisions of the Great Powers ambassador to the British capital on the future borders of the Balkans: "The response of the Great Powers, made in London by the ambassadors, will be announced soon in Constantinople and in the Balkan capitals. He is also in favor of reconciliation: for the first point, our new border with Turkey, there are no objections; for the islands (in the Aegean Sea). The Great Powers do retreat a little, but retain the right to decide the fate of some of them; for the borders of Albania The forces will communicate their decisions as far as the northern and northeastern borders as the southern boundaries are not yet determined. "The many unresolved issues, especially with regard to Albania, the plenipotentiary minister explains as following:" With this answer, that the Great Powers are rushing too much to sign the peace contract sooner. " [7]

The problems concerning the final boundaries of the future Albania are stretching and so remain unresolved during the London negotiations. It seems that the adoption of the Midia-Enos line as a border between the countries of the Balkan Union and the Ottoman Empire seems to be the most problematic. On March 27th, 1913, the plenipotentiary minister in London, Mihail Madjarov, who is also a member of the Bulgarian delegation, reported to Geshov the decisions of the London Conference of Ambassadors. With regard to Albania, Mihail Madjarov notes that "the designated parts of [the] Albanian borders will be communicated and announced to the Allies and the rest will be determined progressively at future meetings." [8]

The issue of the territorial scope of the future Albanian state is not only unsolved to the end the Balkan war, but also causes tensions between Serbia and Montenegro on the one hand, and the

Great Powers on the other. The position of the Triple Alliance and mainly of Austria-Hungary ultimately prevails and defines the general opinion of the major European states. Serbia is deprived of the so-desired access to the Adriatic Sea through the Albanian lands, and Montenegro does not receive the important Shkodra stronghold. In Belgrade and Cetina, however, they do not want to withdraw from the occupied territories in the hope of joining at least part of them. On March 27th, 1913, the plenipotentiary minister in Vienna, Ivan Salabashev, reported to Prime Minister Ivan Geshov for the opinion of the Austro-Hungarian Foreign Minister Count Berchtold on some of the territorial problems in the Balkans and, above all, on the tense situation in connection with the partial occupation of Albania by Serbian and Montenegrin troops.

"At today's diplomatic conversation- Salabashev reports - Count Berchtold told me that the situation is not yet clearly defined. If Montenegrins take Sqtari and refuse to leave it, then there will be great difficulties and complications. He believes, however, that the total blockade will affect Montenegrins and Serbs to end the siege of Sqtari and make them withdraw their troops from Albania. He does not yet have official information on the arrest of the Serb troops in Thessaloniki, but claims that if these Serb troops continue their way to Albania, the Great Powers' warships that do the blockade will not allow them to disembark on the Albanian coast. England strongly supported this view. The blockade would extend to northern Albania including Durazo, too. The Great Powers intended to define the Kalamas River as the southern border of Albania, but this issue has not yet been finally resolved." [9]

With the tightening of the relations with the Allies Serbia and Greece, the government of Ivan Evstr. Geshov is increasingly considering the possibility of getting closer to Albania as a future strategic partner. [10] On May 6th, 1913, Stoyan Danev informed the London Cabinet that he had met with the President of the Interim Albanian Government, Ismail Kemal Bey. The latter said that Albania would rely on Bulgaria's political assistance as well as the possible sending of specialists for government offices and financial officials. Danev replied, according to his own words,

that "I work as much as I can for Albania, because her interests are identical to the interests of Bulgaria." [11]

The London Peace Treaty of 17th May 1913 finally sanctioned the emergence of the new Albanian state. The Ottoman Empire retreats and gives to the Balkan allies all the territories west of the Midia-Enos line but "with the exception of Albania". However, the question of the final boundaries of the future state is never solved. Article #3 of the Treaty states that the Great Powers are delegated "the concern to settle the distinction of the Albanian borders and all other issues concerning Albania." [12]

In the coming years, the new state formation will have many trials to face. They are related both to the territorial claims of the neighbors (Serbia and Greece) and to the problems surrounding the political construction of the state and the internal consolidation of the Albanian tribal communities. The role of a strategic partner, which Albania has begun to acquire, in the eyes of some of the Bulgarian diplomats, does not acquire any real dimensions. In 1913, as a result of Macedonia's new division and after the end of the Second Balkan War, the Albanian lands remain far from the Bulgarian state borders.

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## DISCIPLINE IN THE PRIMARY CLASSROOM

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### ABSTRACT

*This article analyzes the matter of discipline in the primary classroom. It is very difficult for teachers to educate students that are noisy and not concentrated. The problem about the bad discipline of now-a-days pupils is discussed in another author's research as well. Teachers confess that sometimes they are powerless and have no pedagogical influence upon students. Some methods for achieving a good discipline in class are proposed. One of them is behavioral check-list using, that will help teachers to determine concrete difficulties in different cases and will show them ways to create an adequate plan for social-pedagogical intervention.*

**Key words:** *discipline, primary classroom, behavioral check-list.*

### INTRODUCTION

Results of an author's study allow the lack of discipline in the primary classroom to be identified as one of the main socio-pedagogical problems in elementary school. Alternative forms of interaction with students are sought and appraised in practice. Innovative classes and schools are being created. Teachers aspire to adapt to conditions of modern educational environment in which the authoritative and permissive style of teaching are used.

Regardless of the form of interaction with children, the main goal is to:

- a) create conditions for the optimal realization of process of education;
- b) create in students a desire for co-operation with teachers;
- c) increase the real motivation of children to learn;
- d) create an attitude for behaviors that do not deviate from the established norms;
- e) show respect for the educator;
- f) teach the child to adhere to specific rules in the classroom, respectively in society;
- g) bring to the child certain demands that show him that besides rights, he has duties that he has to fulfill;
- h) create in the child sensitivity to the deviant manifestations of others, not tolerance and indifference.

In this sense, achieving discipline in the primary classroom should be the most important goal of the educator because its lack will hamper

the full performance of the school's functions. It is not possible to implement an effective educational process if pedagogical interaction between teacher and student is not based on mutual respect and especially on established rules of conduct.

Of course, the established rules should apply to all participants in the educational process. In addition to familiarizing with the basic rules of conduct, all pedagogical subjects should be aware that non-compliance implies the imposition of any prior sanctions. Consequently, each student must be aware of the consequences of his behavior, which will also help him / her become an adult in society.

It should be emphasized that the sooner the children become aware of responsibility for their actions, the sooner they will learn to think about their actions in advance. Most likely, such consciousness will lead to a demonstration of fraudulent behavior in the future, which is determined by the acquired habit of complying with rules and by the knowledge of the consequences.

There are some effective approaches to establish a good work atmosphere in the primary classroom.

First of all it is a school's behaviour policy that "plays an essential role in achieving good behaviour across a school". "It needs to be reviewed on a regular basis and communicated often to:

- pupils;
- staff;
- parents/carers.

Such policies should also be informed by an audit of the behaviour needs within the school. This should include:

- the nature of the negative behaviours displayed by pupils;
- background details and characteristics of the individuals responsible;
- the location in which incidents occur;
- an assessment of the successfulness of the interventions implemented” (*Martin & Harper, 2014; Steer, 2009*).

Second is that all staff “should be equipped with the skills to understand and effectively manage pupil behavior. All staff joining the school should receive induction training that covers behavior management. All staff should be provided with opportunities to regularly share and develop their skills in promoting positive behavior. The specialist skills of individual staff members that have particular leadership responsibilities for improving behavior should be developed as well (*Martin & Harper, 2014; Steer, 2009*).

Next approach is effective leadership as a “key to manage pupil behavior. Most difficult behavior is almost always managed well in schools where senior leaders provide clear direction and reassurance to staff. These effective leaders monitor the management of pupil behavior and their regular presence around the school creates a sense of calm and order. It is important for senior managers to observe the behavioral difficulties that class teachers experience so they have an understanding of the range of challenges they face. This helps to ensure that appropriate interventions are put in place across the school” (*Martin & Harper, 2014; Steer, 2009*).

In addition, “schools with good standards of behavior achieve a balance between the use of rewards and sanctions. Praise is used to motivate and encourage pupils. At the same time, pupils need to be aware of the range of interventions and penalties that could be applied if they misbehave” (*Martin & Harper, 2014; Steer, 2009*).

Another approach, which is very effective, is an appropriate curriculum. “Adopting a coherent curriculum and setting personalized and relevant targets for pupils is particularly successful. These targets should include:

- academic;

- social;
- emotional;
- and behavioral elements as well (*Martin & Harper, 2014; Steer, 2009*).

When pupil are involved in environment development they behave much better. “Creating a sense of pride among pupils about their school has a positive impact on attitudes and behavior. In primary schools where play areas are well organised and supervised, poor behaviour is minimised” (*Martin & Harper, 2014; Steer, 2009*). Other strategies for effective classroom behaviour management are some of the following:

- “adopting a consistent approach to behaviour management;
- actively engaging disruptive pupils;
- establishing clear rules and expectations for the whole class, as well as for specific individuals;
- praising specific actions or incidences contingent on particular positive behaviors;
- acknowledging and reinforcing positive behaviours;
- creating a positive classroom climate” (*Martin & Harper, 2014*).

## EXPERIMENT

In this line of thought, a study was initiated among primary teachers, whose purpose was to establish their opinion on the necessity of discipline in the primary classroom, as well as the methods they use to achieve it. It is very difficult to establish and formulate a common working notion of discipline in the classroom because each pedagogue has a different view of pupils’ behavior.

Some pedagogues are more liberal, others are far more stringent, and others tend to be negligent or to show a lack of pedagogical interest - examples of this are many among pedagogues in pre-retirement age. In general terms, the lack of discipline can be defined as an inability to create an atmosphere conducive to the educational process.

For the purpose of the survey, teachers fill out a questionnaire consisting of 25 questions in the context of the topic under consideration. The study is pilot. Filling in the survey cards is absolutely anonymous.

Object of the study are 17 primary teachers, Subject is their activity to achieve the desired working environment in the classroom. All

pedagogical impacts that are determined by the primary teacher's attitude to achieve optimal results in the realization of interaction with children are sought.

Tasks that serve the purpose and are met during the survey are:

- a) to make a short literary review of the problem under consideration;
- b) to formulate a goal, subject, object, hypothesis, and research objectives;
- c) to indicate the main stages of the study;
- d) realizing the study and reporting the results obtained;
- e) formulating conclusions based on the results obtained.

The hypothesis of the study is that if a good discipline is established in the primary classroom, it will optimize the possibility of an effective educational process.

## RESULTS AND DISCUSSION

The analysis of the results obtained from the realization of the study allows the following conclusions to be drawn regarding the pedagogical efforts of the initial teacher aimed at achieving good discipline in the working environment.

- 1.) Increasingly, primary teachers don't rely on traditional forms of educational influence because their effectiveness is not evident in the contemporary pedagogical interaction.
- 2.) Today, the use of alternative forms of interaction has produced positive results. However, it is difficult to determine their value categorically, because some of them may occur after a longer period of time.
- 3.) Primary teachers often complain about the new educational law which, in their opinion, gives students only rights and no obligations.
- 4.) Initial educators believe that one of the main reasons for the lack of discipline in the classroom is an all-day training organization that leads to exhaustion of students and weakens the possibility of effective parental control.
- 5.) Primary teachers usually focus on the inability to deal with family education gaps.
- 6.) It turns out that many of the students have a weak inhere to the study material, so they are restless and noisy during the class.
- 7.) Lack of appraisal and notebooks in primary school may also prove to be an ineffective form of pedagogical impact because pupils and their

parents lose a sense of applied control, which on the other hand leads to a reduction of effort and the pursuit of high scores.

8.) The learning motivation of children in primary school age should be constantly upgraded and provoked in order to achieve the goals set.

9.) The education and training process is impossible if there is no wish for the students to cooperate, which must also be continually provoked. An extremely effective method of inducing a willingness to cooperate is a vote of confidence from educator to child, as well as providing responsibilities and mandating enforcement tasks.

10.) One should not ignore the students who worsen discipline in the class or perceive themselves as „annoying flies“. There is not a small number of teachers who think that if they do not pay attention to students who create problems in the classroom, with time they will cease to provoke others. Pedagogical practice shows that there is reason to have such an assertion, but it is not universal and can not always be applied when there is bad discipline in the classroom. The primary teacher has a pedagogical responsibility towards each child. In this sense, the problem should not be ignored, but rather defined and resolved in the most pedagogically feasible way.

Some of the main methods used by the modern primary educator to maintain good discipline in the classroom are: project-based education, behavioral check-list and multimedia presentations.

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COMPREHENSION OF MEDIA TERMS BY THE PEDAGOGICAL AUDIENCE

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ABSTRACT

The results of a survey, in which the comprehension and the practical application of media terms by teachers, students and university lecturers are tested, are presented.

**Key words:** mediapedagogy, mediaculture, cinemaeducation

INTRODUCTION

Mediaeducation is one of the main educational strategies of 21<sup>st</sup> century, a part of the innovative training. It is in the state educational standards and becomes a necessity for both secondary and higher education. Are the teachers ready for this challenge?

A survey carried out among 40 respondents, students, teachers and lecturers at “Prof. Dr. Assen Zlatarov” University, Burgas, gives an answer to this question. Three of the questions in this survey are related to the comprehension of theoretical concepts and the options to be chosen are unlimited.

EXPERIMENT

The answers to the questions, subject of analysis in this article, are supplied by the researcher and each interviewed person can point one, several or all of the listed answers as well as give their own answer. The results obtained are presented in three tables:

Table 1 Concept of mediaeducation [2]

Answers	%
a/ personality development through the means of mass communication;	72,5
b/ analytical approach to the information product;	22,5
c/ developing critical thinking, not allowing manipulative influence on one’s own assessment;	30
d/ synthesis between ethic and aesthetic;	17,5
e/ gaining knowledge about the history and functioning of the media;	35
f/ gaining theoretical and practical skills for working with the mass media tools;	57,5

g/ possible combinations of specified answers;	7,5
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h/ other – point out:	0
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Note: The aggregate of the resulting percentages exceeds 100 because the respondents have given more than one answer.

Table 2 Concept of mediaculture [2]

Answers	%
a/ combination of material and intellectual values in the field of mass media;	67,5
b/ reproducing them in a particular form in the past and nowadays;	20
c/ ability of perceiving, analysis and evaluation of mediatext;	47,5
d/ gaining new knowledge in the field of mass media;	35
e/ ability for media-creative activities;	27,5
f/ possible combinations of the given answers;	10
g/ other.	0

Note: The aggregate of the resulting percentages exceeds 100 because the respondents have given more than one answer.

Table 3 Concept of cinemaeducation in contextual plan [1, 2]

Answers	%
a/ types and genres of cinematographic art;	90
b/ historical development of cinema as an art;	65
c/ cinema language;	47,5
d/ history of the national cinematography;	35
e/ cinematographic functions in the social system;	5
f/ gaining theoretical and practical knowledge about cinema;	47,5
g/ interpretation, evaluation and	52,5

analysis of cinema text;	
h/ possible combinations of the given answers;	7,5
i/ other.	0

Note: The aggregate of the resulting percentages exceeds 100 because the respondents have given more than one answer.

## RESULTS AND DISCUSSION

### Mediaeducation

The concept of media education as an educational strategy has nothing to do with the experience and professional preferences of the researchers, unlike the two other terms. It is a result of their individual attitudes and perceptions in general. The largest percentage of options comes from the perception of media literacy as personality development through the means of mass communication - 72% - and this is in conformity with the field they have chosen to work in. The concept of the term as a means of acquiring theoretical and practical skills for working with mass media comes in the downward hierarchy - 57.5% - the result of the continuous processes of intensification of education. The knowledge of the history and functioning of the media comes in the middle part of the scale - 35% with approximately equal number of choices, and the development of critical thinking, the avoidance of manipulative influence on one's own assessment - 30%. Utilitarian and anti-conformist thinking here are coexist in a strange way – 14 people of the surveyed are ready to accept media education as the following educational tool and 12 people see it as means of self-determination, of keeping a distance from the information flow and building individual criteria for what is happening, impervious to external influences. 22.5% are for an analytical approach to the information product - this is also an approach against uncritical thinking. 17.5% consider media literacy as a synthesis between ethic and aesthetic, probably as it was its primary function before it grew and questioned many educational paradigms.

### Mediaculture

The responses to comprehending the content of the term "media culture" are differentiated according to the experience and qualifications of those surveyed. For students, this is mainly gaining new knowledge in the field of media and the ability to develop media creative activities.

Teachers rely on the reproduction of this knowledge and university lecturers – on building skills for media analysis and assessment of media text. The two groups, teachers and university lecturers, are united in their concept of media education as a collection of material and intellectual values in the field of mass media - 67.5%.

### Cinemaeducation

New curricula will be in force during the academic year 2017/2018 at "Prof. Dr. Assen Zlatarov" University. The optional disciplines "Cinematography" and "Cinema and literary education" appear in the pedagogical specialties. They rely on artistic syncretism. While literature has long held its place in the educational process, film education, despite its world-proven educational potential, remains with unclear status for pedagogues.

Students from pedagogical specialties and primary school teachers consider the knowledge about types and genres a priority as far as cinemaeducation is concerned - 90%, for its historical development – 65%. Cinemaeducation has a predominantly informative function as far as their ideas are concerned: it provides primary school students with an initial knowledge of cinema as a public phenomenon in an easy and accessible way.

Students studying "Bulgarian Philology" and university lecturers emphasize the interpretation, evaluation and analysis of cinematext - 52.5%, as well as the history of national cinematography - 35%. This option is the result of a number of prerequisites: cinematography as a literary work is subjected to verbal-logical decoding like any piece of literature and in the history of Bulgarian cinema there are many screen versions of classical works that offer some kind of cinema reading of the plot and give additional possibilities to enrich the analysis of the works.

For this group of options the contact with cinematographic art has a predominantly analytical character. For Social Sciences teachers improving their professional qualification, the most important is the cinema language - 47.5%, and the cinematographic function in the society - 5%. For them, artistic and documentary films are an educational tool as far as the problems and the impact of public reality are concerned. They evaluate social content, communication strategies for intergenerational communication.

Representatives of the three groups find it reasonable to say that cinemaeducation guarantees gaining theoretical and practical knowledge about cinema - 47.5%. This classical thesis has been held in Bulgaria since the 1980s since the appearance of the first publications on this topic. Its espousers have a common characteristic – all of them are over 40 years old.

## CONCLUSIONS

The analysis of the results obtained justifies the following conclusions:

Future and present teachers are prepared to work with media products within and outside educational standards, focusing more on practical training and self-training than on gaining theoretical knowledge.

The emphases in the contextual part of the media terms are intuitively determined closely

related to the audience under training – students of primary and secondary school, university students.

Teachers and University lecturers consider the knowledge in mediaculture a solid foundation to be build on in the direction of specialized skills while the students are looking for the effect of them in presentation, interpretation of media samples, entertaining examples, studying cases.

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## THE RELATION “SCHOOL-THEATRE” IN THE METHODOLOGICAL HERITAGE OF NEDELCHO BENEV

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### ABSTRACT

*The pedagogical experience of Nedelcho Benev is presented in this article. Nedelcho Benev made experiments with stage adaptations and with writing stage adapted reading materials in primary school. He was a follower of free upbringing and considered school a pedagogical laboratory in which he put the ideas of aesthetic enrichment and self-enrichment for the free reign of children's imagination into practice.*

**Key words:** school-theatre, methodology of training, history of Bulgarian education

### INTRODUCTION

In the 1920s and 1930s the ideas of free upbringing stimulated Bulgarian teachers to look for new means for pedagogical practice enrichment.

In the triad literature-theatre-school Nedelcho Benev could see a good opportunity for improving the methodological tools of Bulgarian language and literature teachers in primary school – according to his ideas, he had to make his students worship the theatre by creating his own dramatic writings and creative work with stage adapted readings.

### PRESENTATION

#### About the writer and the pedagogical experimenter

Nedelcho Benev (1887-1971) was born in the village of Ivankovtsy, Gabrovo region. He was a graduate of the Teacher Training Institute in Russe. His gift for writing manifested itself in his early school years but it was not until the period of the Balkan Wars (1912-1918), in which he took part as a non-commissioned officer, that his talent developed to its full power. His artistic heritage includes:

- children's drama works: “To the Sun” (1923), “For Alive Water” (1924), “The Secret Key” (1925), “Mother Stepmother” (1926), “The Little Rescuers” (1927), “Town or Village” (1934), “The Best Friends” (1932), “Struggle for Faith” (1940);

- short stories: “Lonely Silhouettes” (tales and short stories, 1914), “Years of War” (1940);  
- poems: “My Songs” (1933), “With Glasses to the Moon” (poems and sketches, 1938);  
- short novels: “War and Love” (1930);  
- a collection of articles: “A Look Around” (1942), dedicated to writer Iliia Ivanov-Cheren, etc [3, 4].

Being a connoisseur of his works, Dimitar Dobrev claimed: “Because of the true reflection of a child's soul, the plays found a good reception. Also because of the true reflection of reality, the author was taken to court – a wealthy man from Gabrovo had seen some of his own personal characteristics in one of Benev's plays.” [2, p. 513]. Hearing about the court case against Nedelcho Benev, the Tolstoyist newspaper “Svoboda” sympathized with him and supported him within a membership. He maintained relations with the Tolstoyists and vegetarians through the Temperance societies and the League for New Upbringing. He actively co-operated with the Tolstoyist newspapers “Revival” and “Free Upbringing”.

Nedelcho Benev became one of the founders of the Union of Provincial Writers.

At the same time, he was a longtime member of the management of the “Aprilov-Palauzov” Folk Community Center and together with librarian Petar Stoev he collected books, newspapers and magazines published by citizens of Gabrovo, thus creating the first Gabrovo archive. It was his idea to organize a community centre amateur drama theatre. An enthusiastic actor, chairman of Gabrovo Municipality Theatre, Benev, together with other amateurs, kindled the spark of theatrical art. He contributed

to the community centre newspaper "Izvestia" (News) with poems, stories, articles, and edited certain issues.

A pedagogue with 33 years of experience and a high school director, he shared his experience in the "Live Linguistics" teacher's guide (1928). Its republishing in 1939 was under the subtitle "Theory and practice in grammar, reading, composition and children's theatre" [1]. Some of his articles in the magazines "Free Upbringing" and "Pedagogical Practice" logically continued the same thematic problems.

### **Nedelcho Benev and the Children's theatre**

In the book "Live Linguistics", recalling the historical development of the theatre in Bulgaria since the Revival period, the author talked about the good traditions of joint participation of students and teachers in amateur performances.

In this context he set the requirements for each school to have a theatre and a stage where public performances for students and parents should be organized. In the performances the author did see just ordinary entertainment. They were, in his opinion, an organic continuation of the education in all fields of linguistics. "Here the younger people will hear the magic power of human speech, depicted in the verbal images of verses, tales or dialogues and elder people will realize the construction and the forms of various literary genres." [1, p.25].

He analyzed two productive ways to satisfy the aesthetic needs of students:

- children's operetta - it combines musical and dramatic elements; this unity is not always achieved - good music is usually combined with elementary storyline, and a dramatic message is rendered meaninglessly by a superficial musical motif. The author dreamed of an original children's operetta, without imitation of foreign works and close to folklore songs;

- children's drama – an artistic and complete work that represents man and the humane; the struggle between good and evil; the pursuit of moral purity. Students are the performers and the teacher should be the director. He characterized the actors and insisted that every participant should consider whether they were able to enter the character of the hero; he gave advice for the voice and the stage behaviour; he performed staging and rehearsals and chose a suitable prompter; he worked for the scenery, sound, make-up, clothing supply, etc.

Nedelcho Benev's contribution to theatrical didactics is in two directions: he gave the algorithm of the first attempts of writing dramatic works and student amateur activity for adapting classical texts for screenplays of theatrical plays presented on school stages.

#### **1. Dramatic composition**

1.1. First lesson – comments on an amateur play already seen – contents, characters, and way of writing. For this purpose the text is given and the students learn what an act means – the event happens at a certain time and on a certain place, without interruption; in more acts time and place are changed. The following is explained in an easy way:

- the list of actors – gives the number of the characters who have lines in the play; the presence of indirect speech at the beginning of the drama – it contains directions for the scenery; the lines in the brackets are not actors' lines but those of the author;

- the nature of the action - it must be organized in such a way as not to allow the scene to remain empty;

- giving assignments – to read plays taken from the school library at home [1, p. 57-59].

1.2. Second lesson – learning the skill to create a dramatic composition that includes:

- choosing an event – to provoke, to be entertaining in order to become the basis of the dramatic action;

- choosing the participants in the event – physical and speech characteristics; what part has been given to them – main or secondary;

- comments on the title – to reflect the theme of what is happening;

- moral for the spectator.

1.3. Third lesson – creating a dramatic composition; this process goes through the following stages:

- revision of the material already mastered;

- choosing an event which has to meet certain requirements in order to be the plot of the dramatic action

- specifying the time and place of the action;

- description of the actors - age, kinship, clothing;

- spelling and punctuation requirements - at the beginning of each line the name of the acting person is recorded, followed by a point and the lines they pronounce.

The accompanying activities are specified in brackets;

- writing own dramatic works;

- reading in front of the class and joint review  
- everyone has the right to give opinion on the choice of the title, characters, their behaviour and their lines, can the writing be used as a moral and whom it is directed to.

“Thus the students could become so keen on this new type of composition for them that they could be willing to write only “dramas”, even to present them on stage. This shows that drama as a verbal expression of personal experience is very close to the active nature of children and they easily get attached to it,” Nedelcho Benev claimed [1, p. 63].

2. Dramatized readings - within two lessons, students turn works by famous writers into stage adaptations.

2.1. First lesson – introducing the author and the work. The work is read and divided into episodes according to the place of action. The teacher assigns a task asking the students to retell orally the separate episodes to see if they have understood the plot of the story. The moral is sought on purpose – what the author wants to suggest to the readers. A character sketch of the characters is made.

2.2. Second lesson – before the written work the following activities are carried out:

– specifying the situation and actors; revising how indirect speech is turned into direct speech;  
- reminding the rules of drama writing, studied during the lessons of drama composition – and the difference here is that the base is not a text, personally created, but a work of a famous writer;

- written composition – dramatization of the work [1, p. 65-70].

## CONCLUSION

The ideas of Nedelcho Benev concerning the relation between school and theatre have more practical than theoretical character and their addressees are students and primary school teachers. Thus he supported his pragmatic views about the relation between education and art which correspond to the ideas of the League for New Upbringing. This associates him with the quests of Ilia Enchev who, however, in spite of the written and successfully presented author’s plays, tends to be more theoretically inclined as far as school and drama education is concerned.

The name of Nedelcho Benev, with his methodical contribution for the enrichment of theatrical knowledge and the development of drama skills by means of linguistic literary education, can be ranked next to the name of Konstantine Sagaev, who adapted the European experience of theatrical didactics to the Bulgarian conditions in the 1920s and 1930s.

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**ADVANTAGES AND DISADVANTAGES OF USING MULTIMEDIA IN MUSIC LESSONS.  
PROBLEMS AND SOLUTIONS**

**(Based on empirical data supplied by students – future teachers)**

**PART ONE**

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**ABSTRACT**

*The advantages and disadvantages of multimedia in music lessons is currently an issue attracting huge interest. The importance lies in the specifics of the involved components which are music, students, teachers and technologies. These components are closely intertwined in the education process, in particular – in music lessons, which predetermines the theoretical research in part one. Part 2 describes the empirical study, which includes studying the students' opinion on using multimedia in music lessons, summarizing the collected information and analyzing the data received.*

**Key words:** *music, music education, multimedia, teacher, school*

Each time period comes with its own requirements for a form of teaching that keeps up with the times and is individually fitted to the student which at the same time is also directed to preparing growing people for the near future. Our time is known as the century of technologies. Machines, robotics, computers, and new technologies are an integral part of every action in everyday life, including training. It is the need for up-to-date and effective training that has become a prerequisite for the adoption of the "Strategy for the effective implementation of Information and Communication Technologies in Education and Science (2014-2020)" in 2014. The Strategy outlines important and purposeful parameters. However, practical solutions are needed to achieve this, and specific developments on the subject areas of science and art at school. This again determines the importance of the discussed problem. [8]

The advantages and disadvantages of multimedia in music lessons is currently an issue attracting huge interest. The importance lies in the specifics of the involved components which are music, students, teachers and technologies. These components are closely intertwined in the education process, in particular – in music

lessons. That is why it is important to discuss each of these components.

**MUSIC – What are the specifics of music training/education?** It is obvious that music lies in the basis of this training. Music is an art with bright individuality and specificity.

Music is an art closely related to people's life – an art which can communicate in a specific way all the range of thoughts, feelings, experience, various pictures and events. Music has originally existed and influenced not only life of little children and students but also people of other age groups.

The objective of musical activity is systematically pursued in the process of music education by purposefully developing the good ear for music and laying down the foundations of students' musical culture. However, music education is not confined to the musical- ethic development but also it includes providing optimal conditions for influencing the spirituality, moral, intellectual and social development of children and students by means of music. This influence is real and possible and it is based on the various functions of music: relaxing, hedonistic, suggestive, cognitive, transforming, etc.

Music education has specific peculiarities, which in general we can focus first on the student personality and second, but not second in importance, on the role of the music teacher.

**STUDENTS – *What are modern students? And how are their needs met in music lessons?*** Modern students are to a large extent informed, eager to learn but demanding attractiveness and motivation in presenting and acquiring new knowledge. Notwithstanding the individual differences students show a high level of responsiveness to music. Arts and music in particular meet the needs of emotionally-aesthetic and intellectual-aesthetic experience, of creative activity, of communication with music, of the opportunity to influence important personal conclusions through the messages of music abstract language.

**TEACHERS – *What is the mission and the role of music teachers? What skills and competences make their proficiency? The personality, qualification and competences of music teachers, since they act as a bridge between music and students,*** are essential for the realization of a music lesson. Music teachers should master emotional intelligence, charisma and aesthetics in their overall behavior. They also have to master a huge range of theoretical and practical knowledge, skills and competences. Theoretical and practical knowledge and skills as well as pedagogical ones determine the professional competency of music teachers. Music teachers are supposed to have knowledge in the field of music theory, history of music, instrument knowledge, music analysis, music folklore, conducting, music psychology, musical instrument studies, music analysis, writing music notes and even more of methodic and organization of music activity. Music teachers are also required to use a large volume of the above mentioned knowledge, as well as other auditory and performing skills, such as: having note literacy, having clear and precise conductor gestures, mastering vocal-choir habits, singing expressively and accurately, playing a musical instrument, making accompaniments, creating instrumental scores, and so on and so forth.

Such a huge, music-based training is a prerequisite requiring a combination of high and specific pedagogical skills such as *the skill to talk to children about music.*

The mission of teachers is to prepare the future generation for a fulfilled life, and for this reason their activity includes the knowledge of

contemporary musical phenomena and achievements, including technologies.

**TECHNOLOGIES - *What is the attitude of modern students towards modern technologies?***

Researchers point out that today's generation has a radically different way of thinking and that modern students take new technologies for granted and they are positively open to and connected with them, and thanks to new technologies, students have access to a great deal of information. At the same time, however, it is pointed out that access to too much and varied information is accompanied by difficult concentration of these same modern children.

***What are the opportunities of multimedia in the process of education?*** Multimedia (from Latin multi - many and media - means) is defined by some people as art and by others as a means of combining sound, animation, video and other types of media complemented with color and contrast. Undeniable fact is that multimedia enables information to be presented in a concise form. At this point, it is also an undeniable fact that, despite its great potential, it cannot and will not be able to replace books and textbooks. In recent years multimedia has been in the focus of many researchers. Thus R. Papancheva and Kr. Dimitrova [4] raise the issue of integrating information technology into elementary school. The authors also point out disadvantages, and in order to overcome these problems, they offer and realize the development of projects that integrate knowledge from different fields such as: "Spring carnival" - preparation and realization of a spring carnival for integrating knowledge from different fields, including music. Here, it is appropriate to specify that in the above-mentioned projects music training/education is not carried out and the already acquired material is included in the integrated knowledge and more precisely in the emotional experience of this knowledge.

**How do the proven influences of multimedia correspond to music education?**

To understand this we analyze its main aspects:

➤ Multimedia introduces interactivity, which is also *an essential feature of the education process, including music education;* Multimedia is an interactive technology in which interaction with the user is set. *To what extent, however, does the music-media interaction place students in the position of adequate users?*

➤ Multimedia allows a variety of teaching, a variety of presenting material. *Using various forms and methods in presenting new information and music works is a leading*

*principle and requirement of the methods of music education. It is appropriate to emphasize on the fact that the variety is organically connected with the coloured images and content presented by music.*

➤ Multimedia stimulates the interest and activity of children, it motivates them. *Encouraging the interest and activity of children and students is an obligatory first step in music education. What is more, the organically connected with music motivation for activity in music education is essential because learning a piece of music in music practice is associated with multiple purposeful repetitions.*

➤ Multimedia focuses the attention on the tasks set. *It is the right moment to ask the question: can there be development, including music development, without focusing and keeping attention to the tasks? And without answering, we will make it clear that in the methodology of music education the ability to formulate understandable tasks which are also questions and specific directions of activity has its own place.*

➤ Multimedia puts students in situations, in the position of participants in the story that is presented on the screen. *Music with its message also puts students in a variety of situations that are emotionally coloured.*

➤ Multimedia facilitates the process of education influencing a larger number of senses, i.e. sound and image. Multimedia illustrates and visualizes study content through pictures, photographs, charts, animations. *Giving arguments for this should be based on the assumption that music is always associated with ideas that can be visual, motor, or purely auditory. And the concepts are strictly individual. Presenting images, such as the content of an instrumental work, we should ask ourselves how effective the unifying the ideas of all students is.*

➤ Multimedia is an easy, understandable, accessible and quick way of learning. *Without questioning, we specify that for music education, besides learning of art-related information, it is also important to develop music skills. On the other hand, music skills are defined as the ability to perceive, experience and reproduce music, and this is accomplished with many repetitions and activities in the conditions created for the emotional experience of the music message.*

➤ Multimedia in certain cases leads to the lack of opportunity for students to create their own ideas about the studied material and even to

put students in the position of consumers. *This in terms of music education means that the learning process is disturbed, and even that it is detrimental to the overall development.*

As it has become clear between the proven effects of multimedia and music, there are a lot of similar features but there are also specific manifestations. It is the specific manifestations of music education that raise questions that are not answered on purpose.

After presenting the specialist's position here in the second part we focus on the opinion of the students-future teachers in primary school. Why this opinion is so important as far as "advantages and disadvantages of multimedia" is concerned? Because young people are innovative and innovation is the technologies, in this case, because they are the future organizers of the educational process.

In the following second part we describe the purpose, organization, data analysis and the conclusions connected with it, and a summary of the obtained empirical research data.

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## PREVENTION OF CHILD OBESITY IN AN INTERACTIVE ENVIRONMENT

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### ABSTRACT

*Obesity in children is a problem with a very high social significance. Just in the last 30 years, abnormal weight in the youth has almost doubled, and today at least 25% of youngsters weigh more than is considered healthy, have low indices of good cholesterol, higher than normal for their age blood pressure and therefore are at a higher risk of developing cardiovascular diseases, in comparison with their lower weight peers. The following survey focuses on this problem and the negative tendencies related to it, and is presented in a completely unconventional and non-standard approach, namely with interactive methods and interactive environments for the prevention of childhood obesity. The interactive environment offers an extremely rich variety of methods and tools, which turn children from passive observers and consumers into active partners and creators of their own knowledge. Interactive approaches require partnership relationships and a dialogue between the kids and all the participants in the activity.*

**Key words:** *prevention, healthy eating, interaction, interactivity, interactive environment, team-competition approach*

### INTRODUCTION

Obesity is the most widely spread chronic metabolic disease of the modern times with extremely serious consequence in the long term. The World Health Organization (WHO) classifies it as a global epidemic and a significant issue for the social health. Overweightness and obesity among children and adolescents is becoming larger in scope, especially in developed countries. According to the WHO at the end of 2010 around 43 million children under the age of 5 were with higher than normal weight. In Europe, they are around 22 million and around 5 million of them suffer from obesity. Bulgaria is in the top six countries in Europe in this regard. According to a survey of the National Center of Public Health and Analyses children with higher than normal weight are 200 000, with 65 000 of them being obese. In the group of 7-year-olds 30.6% are overweight and 13.6% are obese. In 2004, 13.9% of the children aged 1 to 19 are overweight and 4.6% are obese. A similar picture is seen in a previous national survey of dietary and nutritional status of students (1998) where it was found that among first graders 23.3% were overweight and 7.2% are obese, in adolescents 19% of boys and 16% of girls aged 7 to 18 are

overweight, 4.3 % of boys and 3% of girls are obese. The highest relative portion of children who are overweight or obese is around the beginning of puberty – 13 years of age in boys (25.6% - overweight, 6.9% are obese) and 10 years of age in girls (20.5% overweight and 4.6% obese). The primary cause for obesity is the changed lifestyle of the modern society, associated with the harmful dietary habits, reduced physical activity and stress. A significant factor is the genetic predisposition. In the absence of obesity in the family, the probability of the child to get afflicted is under 8%, whereas if one of the parents is overweight – the frequency of obesity their children reaches up to 40%, and in the cases of both parents being overweight – more than 80%. When the mother is obese there is a higher risk for the daughter, compared to the son, to develop obesity.

Children with obesity are more at risk of developing diabetes and other endocrine disorders, diseases of the cardio-vascular and respiratory systems are more prone to allergies, experience problems in the musculoskeletal system more frequently, develop psychological problems related to low self-esteem, depression, eating dis-



orders (anorexia and bulimia) and others. It has been established, that overweight girls enter puberty earlier, with the cause being the produced by the fat cells leptin. The probability that the overweight children grow up to be overweight adults is much higher than that of children with normal weight. The risk that an obese kid to be overweight in adulthood goes up from 25% if measured before 6 years of age, and up to 75% measured during the adolescence, which is why the problem must be tackled as early as possible. The fight against obesity must start in the early age. "Health education protects from harmful habits and habits if the pedagogical practice creates conditions for the realization of its preventive nature"[4]. But a person realises the threat only once he realises the negative effects. Thus we face the question: „How do we approach the problem in such a way that the children realise the danger to their health associated with obesity?“ Undoubtedly, the approach must be unconventional, enabling the children's imagination and artistry. Such an approach is possible only in an interactive environment of education. Without accounting for the advantages of the traditional pedagogical approach, in which teachers completely take responsibility of the studying process, for the purposes of the long-lasting development it is necessary to allow the child the freedom to take her part in the responsibility, to be active and to interact with adults, to seek and offer solutions, to create. In such a way the child takes his equal place in the organisation and the carrying out of the educational process, in which she has a main acting role. Exposing the essence of the interactive educational environment requires the clarification of the key concepts **interaction, interactivity, interactive perception**. **Interaction** is a psychological term, which means a type of "mutual influence between people in the process of their communication".[1] The term **interactivity** can be viewed as composed of two words: "**inter**" (meaning together or between) and **activity** (an action, initiative) and is related to the interaction between an tutor and a student, as well as between the different students themselves.[3] **Interactive** perception is realized with communication and dialogue between the different sides in the process and those that are learning. The interactive educational environment as an alternative of the conventional education requires a new organization of space – from the arrangement of the furniture used by the kids, for the purposes of the individual and group work, to the possibility of presenting the chil-

dren's creation, boards and thematic sheets for the reflection of positions and opinions, posters and summaries of collective work. The realization of the interactive educational process gives us a lot of diversity of methods and tools, which transform the children from passive observers and consumers into active partners and creators of their own knowledge. The interactive methods require partnership and dialogue between the children in a small group and all participants in the activity. The use of interactive forms, methods and tools helps to overcome the barriers in communication, it stimulates the thinking, generating and sharing of ideas. Each participant in the educational process expresses himself with his own contribution in the development of the educational environment. The interaction helps with clearing up of views, helps with tolerance in communication. It does assume the ability to listen, understand and discuss another view, opinion or attitude different from one's own.[2]

## EXPERIMENT

According to the previously mentioned, we set ourselves a goal to conduct an open, experimental session with children from second grade (8 yrs. Old), related to the prevention of childhood obesity, but in an interactive educational environment – team-competition organisation of the teaching process. Participating were also second and fourth year students from the „Medical Nurse“ programme of „Prof. D-r Asen Zlatarov“ University of Burgas

Tasks:

1. To study the dynamics of a child's way of thinking and the development of the child's imagination in an interactive educational environment.
2. To study the created internal relationships in the process of discussion and interaction in the review of a problematic issue.
3. To conduct actual activities for the prevention of childhood obesity.
4. To develop in the participating students specific professional knowledge and skills for the prevention of abnormal weight in kids in young ages, with an emphasis on healthy eating and physical activity.

The research was conducted in Mihail Lakatnik primary school in Burgas.

For the purpose of the experiment we split the class, consisting of 28 children from second grade, into three groups with a mixed composition of girls and boys and relatively equal num-

ber of kids. The desks in the classroom were grouped in three places and arranged, so that the kids have direct visual contact with each other. In the beginning of the experimental process, a student participating in the study as part of the project „Prevention of childhood obesity“, in an accessible for the children approach, presented „the pyramid“ of healthy eating, the types of nutrients and their meaning for the human organism, as well as an exposition of unhealthy eating and the associated foods. After that, it was time for the children to show some creativity, namely in the group solving of problems.

#### **Content of the first task:**

**Take a close look at the illustrations of the different foods. For each one write down the nutrients that it contains. Time for thinking and discussing in the group is 5 minutes. Decide who will be presenting the solution of the group.**

#### **Criteria for grading: accuracy, originality**

#### **Content of the second task:**

Each group receives a list of the different nutrients, found in healthy, as well as in harmful foods. The lists are the same for the three groups. The task is: find which foods contain the presented nutrients. Suggest a healthy daily menu for breakfast, lunch and dinner and try to correctly combine the foods from which the menu is composed. Decide who will present the solution of the group.

#### **Criteria for grading: speed, accuracy, originality**

#### **Content of the third task:**

On these colorized illustrations are illustrated different fruits and vegetables. The children from the three groups receive the task of choosing one fruit or one vegetable. After the groups make their pick, they receive an objective to express the cycle of development of the product they picked (sprouting, blooming, ripening) through a dance performance. For this task a suitable melody is accompanying the kids as they discuss the solution of the task. The children are supplied with colouring materials, and materials for cutting out and gluing. Time for discussion and solving in the groups is 5 minutes.

#### **Criteria for grading: accuracy, originality.**

## **RESULTS AND DISCUSSION**

**In the first task the children performed very well. After the end of the discussion time, each group picked a presenter of their solution. The kids were given the opportunity of**

**self-assessment – each group hears out the presentation of the other groups and grade it with 6,5, or 4 points.**

**The first group** made relatively few inaccuracies in connecting a certain food with its nutrients, but pointed out only one type of nutrient per type of food. The group was graded with 5 points by the other groups.

**The second group** made a little bit more inaccuracies. The stated nutrients per food type were sufficient, but again with more mistakes. After being heard out by the other two groups, this one was graded with 4 points.

**The third group** made the least significant and the least number of mistakes. The presenter was supported and complemented by the other members of the group, which unambiguously showed the group aspect of their solution to the problem. This group was graded by the other with 6 points.

Each of the presentators of the group wrote down their grade on a specially prepared board.

The second task was met with a heightened cognitive activity. „Creative noise“ accompanied the discussion within the groups, which is a good proof of the presence of „interaction“. The three groups performed very well, and did not allow a single harmful food in the composed daily menus. The kids found difficulty in differentiating the performance of the first and second group. The variety and combination of the food products and the nutrients found in them were impressive, and thus the first group was graded with 6 points and the second group was graded with 5 points. The third group also performed well, but in regards to the diversity of the foods and thus received an unanimous 4 points.

The third task's presentation was carried out in an emotionally vibrant atmosphere.

**The first group**, accompanied by a suitable tune, presented the sprouting and development of a cherry tree, covered with fruit. One of the children depicted the trunk of the tree, the others the branches, and a third child was the cherry fruit and all of that in an active scenario. At the end the cherries turned into a „delicious juice“. The group was graded with 5 points.

**The second group** presented a new and interesting read of „The Turnip“ tale, but aptly named „No turnip“. The presenter announce that everyone already knows the original story of the grandfather who finally pulls out the turnip with combined help of the whole family. But what would happen if nobody in the family likes tur-

nip? What would they do, so that the grandpa can't pull out the turnip?

To make the game more interesting, the children suggested that the family increased with two daughters, 2 brothers-in-law, two granddaughters and one grandson. That number was suggested, so that each kid could have a role. As a result an incredibly interesting game played out, in which the humorous scenario was that the busyness of the family members prevented them from helping him pull out the turnip. If we carefully observe such a presentation of the kids, it is possible to extrapolate actual relations in the family, but this can be a topic in further publications. **The third group** presented „a modern technology for the preparation of tomato juice“. Several kids from the group formed a jumping, spinning circle, which depicted a tomato-juice portion machine. Of course inside the circle were the „delicious“ tomatoes. For the showed originality, the kids graded the groups' performance with 5 points.

According to our regulations we wouldn't allow the same grading on the same task, but considering the great enthusiasm depicted by the children we made an exception. At the end the following ranking emerged: **first group – 16 points, second group – 16 points, third group – 15 points.**

The solving of the three tasks undoubtedly showed that the kids understood the information, and were correctly directed to a valid and original solution. This is attributed to the fact that the kids presented their own work's product, their own creative solutions, that which they by themselves found out, made sense of, and put out as a solution to the problem at hand. This explains the great interest shown in an educational activity organized in this way. And when there is interest, results promptly follow.

## CONCLUSIONS

The interactive models of tasks described above – team-competitional organization of the work in primary school are a model, in the essence of which are laid out four key components: forming a set of three groups with mixed composition of kids; interaction; criteria-based assessment; group tasks.

The groups must be consisting of a relatively equal number of kids, and the number of tasks, which must be realized in this suggested organization, should be at least two in each session.

The criteria for grading could be any of the following:

**Speed** – which group finished in a faster manner

**Accuracy** – which group presents more accurately, more believably.

**Originality** – which group shows a more interesting, more unconventional solution

**Diversity** – which group develops more than one solution to a specific task

The criteria for grading are chosen according to the specifics of the task, that is they can be combined in different ways for the different tasks.

The tasks for group- competitive work can be classified in **three groups**:

1. Tasks which are entirely specified by the tutor – each component is explicitly pointed out by the tutor

2. Independent formulation of the task by the students themselves – the teacher only states the essential component of the task/play.

3. Tasks with of mixed type.

### **Chronology of the realization of the tasks:**

1. In an accessible manner the students, which take the role of a teacher, introduce the kids to the game, while explaining, in a motivating way, what is required from the kids. The tasks rules can be repeated, but in a synonymous way.

2. In an accessible manner the kids are informed of the criteria for grading, as well as the time allowed for discussion in groups.

3. Start of discussion in groups (interaction). In the process of the discussion, the teacher has to approach each of the groups, listen to their discussion, and give additional directions.

4. The presentation/performance of the task is initiated.

5. Motivated assessment of the performance of each group according to the criteria, or a motivated self-assessment by the groups themselves.

6. Grading points – Excellent performance – 6 points, Very good performance – 5 points, Good performance – 4 points.

The lesson learned was held as a part of the project „Formation of competence in students from the „Nurses“ programme for prevention of obesity in early school age.“

After each task, the awarded points are placed by the leader of the group on a special, pre-prepared board, in the form of stickers with different colours. In the end of the session, it may be announced to the children which group has performed the best. At the end of the open session the students which took part in its prepara-

tion and realization developed a technique for education in healthy demeanor and choice with an interactive nature. They formed skills for communication with kids in a specific age group and learned the principles for interaction when offering health education in a pedagogical environment. The relationship between the pedagogical community and the medical team is important. Only the full interaction between them can guarantee the manifestation of the preventive potential of health education [4]. The introduction of innovation in the education of the medical specialists is a response to the high European and world standards for professional behaviour and attitude of the modern medical nurse for the protection, strengthening and conservation of human health.

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## DEVELOPING AN ONLINE LEARNING COMMUNITY IN A COLLABORATIVE FRENCH LANGUAGE DISTANCE LEARNING COURSE

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### ABSTRACT

*The method of collaborative distance learning has been applied for years in a number of distance learning courses, but they are relatively few in foreign language learning. The context of this research is hybrid distance learning of French for specific purposes, delivered through the platform UNIV-Rcm (Strasbourg University), which combines collaborative activities for the realization of a common problem-solving task online. The study focuses on a couple of aspects: online interactions carried out in small, tutored groups and the process of community building online. By analyzing the learner's perceptions of community and collaborative learning, we have tried to understand the process of building and maintenance of an online learning community and see to what extent collaborative distance learning contributes to the development of the competence expectations at the end of the course. The analysis of the results allows us to distinguish the advantages and limitations of this type of e-learning and thus evaluate their pertinence.*

**Key words:** *distance learning, e-learning, foreign language teaching, collaborative approach, online community, ICT for educational purposes.*

### INTRODUCTION

Bringing together pedagogical innovations and multimedia and network technologies, modern distance learning finds answers to questions related to economic issues in education, issues regarding its role in the recently established information society, the quality of education and, mostly, its accessibility. It also meets the increasing demand of professionals for "lifelong learning" as well as the needs of modern information society. The development of online distance learning is a twofold evolutionary process that has its technological and pedagogical aspects.

The research in the area of online collaboration as a teaching approach at university level proves its efficiency, but it deals mainly with subjects other than foreign language teaching (Henri & Cayrol 2003, Garrison 2007). Besides, the larger part of the research in the area of collaborative learning focuses on online collaboration realized through asynchronous discussion. Other, relatively few researchers deal with e-courses that include both synchronous and asynchronous communication in collaborative activities, with more or less intensive online

interactions (Fulton et al. 2015, Karsenti et al. 2013).

Comparatively much less is the research of online collaboration, either synchronous or asynchronous, in the learning of foreign languages. Due to the need for a more in-depth understanding of the processes taking place in collaborative foreign language teaching (FLT) in an online environment, the present study focuses on this still relatively unresearched area with an emphasis on collaborative design and the opportunities it provides for creating an online learning community.

Our interest in this type of teaching is also determined by the fact that the present-day professional world highly values certain transversal competences, such as team-working, the ability to work in an online environment and technological skills, for whose development this type of teaching provides excellent opportunities.

The goal of the research is to study, from a theoretical and practical viewpoint, the symbiosis between the Collaborative Approach and the modern approaches in FLT for special purposes in the context of online distance learning with the aim of forming online learning communities fostering the development of competences

necessary for collaborative study and work in the highly technological 21st century.

### **COLLABORATIVE APPROACH AND LEARNING COMMUNITY**

A major feature of collaborative learning is the mutual complementation and interdependence between the individual and collective character of learning. Henri and Cayrol (2003) offer a rather broad but clear definition of the Collaborative Approach as applied in a distance learning environment. In their view, "collaborative learning is an active process aiming at progressive construction of knowledge, using the group as a source of information, a motivational agent, a means of help and mutual support, a preferred place for interaction, aiming at collective development of knowledge. It takes into account both the individual and reflexive character of learning, on the one hand, and the social relation through interaction in the group, on the other. Here, the group is the catalyst of learning. By setting a common goal and undertaking a common task, the group learns and constructs its knowledge. At the same time, this allows each learner to come up against the ideas, views and opinions of the rest of the group, which, in turn, bolsters his or her learning."

Collaborative learning and the formation of a learning community are two interrelated terms. On the one hand, the collaborative activities included in a collaborative online distance learning scenario are a key factor supporting the development of a learning community. Unless appropriate conditions for teamwork pursuing a common goal are established, communication and joint work in a team or a group are impossible. On the other hand, the formation of a learning community in the framework of collaborative learning is an indicator of the success of this learning. The learning community is not just a group of people who have come together to gain some knowledge, but a community with a life and history of its own, where each person's opinion matters, decisions are made after discussion and there is an atmosphere of trust and respect.

As pointed out by Swan et al. (2009), the application of the approach and the establishment of a learning community are the necessary conditions for the efficient construction of knowledge in online learning. Within this context, Garrison et al. (2000) have developed a

comprehensive framework representing a model of a learning community, which can be used both for the application and study of online teaching at university level. It is a dynamic model involving the basic elements necessary for the establishment and successful functioning of a learning community, with collaborative learning at its heart. It comprises three main interrelated elements: cognitive presence, social presence and teaching presence. According to Garrison et al. (2000), for the realization of a high-quality collaborative process and the subsequent establishment of a learning community, all three types of presence have to be existent and have to interact effectively.

### **CONTEXT OF THE RESEARCH**

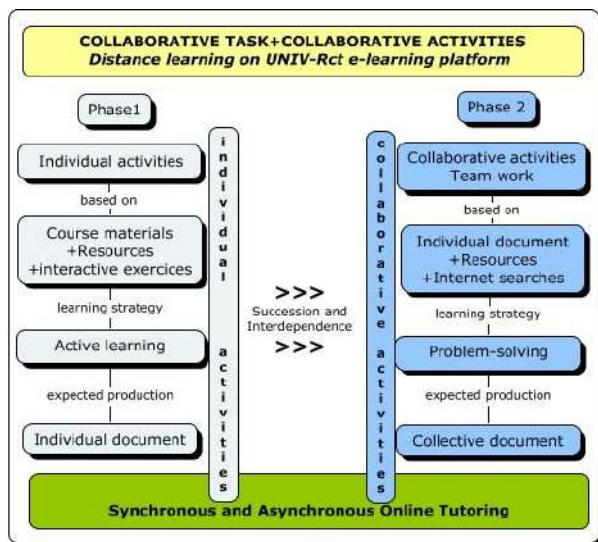
The distance learning course of French for Tourism - FOS Tourisme, on which the present research is based, is a hybrid online course that includes an alternation of classroom and distance learning periods, the distance learning ones, which are delivered through the UNIV-Rct platform, comprising its main part (about 80%). Most of the work, tasks, activities and interactions typical of the collaborative process are carried out distantly.

All teaching aims are realized online; however, there is time allocated for some of them in the classroom periods too. These include the skills of speaking and presentation of different tourism topics. The choice of the hybrid distance learning type was to some extent determined by the specifics of FLT, where the development of competences related to the use of spoken language is relatively more difficult to achieve in a distance learning environment. On the one hand, to develop these competences online the course contents include video- and audio-based tasks which allow learners to hear native French speakers' language, as well as synchronous audio and video Skype group discussion sessions on various areas of the French language (to develop speaking skills and professional competences simultaneously). On the other hand, students work face to face in the classroom periods, where the focus is also mainly on developing speaking skills. The short classroom attendance periods are distributed equally at the beginning, the middle and the end of the course and each has its particular aims and tasks.

The learning scenario of FOS Tourisme course is based entirely on collaborative work.

Collaborative work puts learners in real situations and creates the prerequisites for intensive interactions allowing joint construction of knowledge. Besides, the application of this approach is characterized by mutual complementation and interdependence of the individual and collective character of learning. Most often learning is stimulated by socio-cognitive conflicts and knowledge is constructed through reconsidering one's views as a result of discussions, presenting arguments for an opinion and exchange of information and ideas among the learners.

Students work together in small groups or teams under the guidance of an online tutor to carry out a common, real-life professional task, which leads to creating a common output in the target language. The task puts the students in a problem-solving situation. It is authentic (related to typical professional activities), complex, performed in consecutive stages using a variety of interrelated activities and aims at creating certain production in a certain context. In brief, it is oriented to achieving a common goal through collaborative work.



**Fig. 1** Learning activities – Collaborative learning scenario of FOS Tourisme distance learning course.

The major part of the learning activities is carried out online on the UNIV-Rct distance learning platform. The learning scenario includes the alternation of individual and collaborative activities which are also interrelated and interdependent. This interdependence is shown by the "connection between the production at the end of the previous activity and the object of the activities that follow" (Quintin et al. 2005). Thus,

the learning scenario for each seminar of FOS Tourisme course consists of two consecutive interrelated and interdependent stages (Fig.1).

The online interactions in the course are carried out entirely in French and are an integrative part of the learning process. In FLT the language is both a teaching instrument (it is the main means for mediation) and a goal of language learning (Lamy et al., 2007, in Mangenot 2008). For this reason, the interactions in French that we urge on our students during the realization of the tasks are part of the strategies for achieving the goals of the language course. The online interactions are planned at the learning scenario stage and are defined in the task description in the form of guidelines for work, every effort being made to provide only a moderate amount of prescription so that students can have the opportunity to use their own initiative regarding the organization of work.

Tutoring is an integrative part of the learning scenario. It is the main connecting element between all participants in the system. In the learning process the tutor carries out both proactive and reactive distance guidance depending on the needs and the stage of learning, the proactive guidance being predominant at the beginning and later turning to reactive due to the increase of learner autonomy

## METHODOLOGY OF THE STUDY

The epistemological position adopted for the present study is associated to the socio-constructivist paradigm, the objective being to understand the rules of constructing the dynamics of the learning community. The study combines quantitative and qualitative methods for the collection and analysis of data obtained from several types of sources and, by cross-checking them using the triangulation method, aims at achieving a higher credibility of the results, providing reliability of the research and increasing data validity.

The data, which were collected using different methods (questionnaires, interviews, online observations), allow not only to study students' opinions and their relations, but also to observe the real interactions in the medium adding the experience of the tutor/researcher as a participant in the learning process and her personal judgments, which complement the general picture.

The course was taken by 25 students, for whom distance learning was a completely new

form and who used a distance learning platform for the first time. For most of them (72%), team work was also a new experience. Nevertheless, the students demonstrated a high level of adaptability to the new learning strategies as well as eagerness to experiment with a novel type of education, attracted mostly by the flexibility it offered with regards to timing and space and the opportunity to use ICT throughout the course.

## **RESULTS AND DISCUSSION**

The epistemological position adopted for the present collaborative scenario is most often related to the concept of learning community, where learners construct their knowledge together, sharing common goals and common microculture. On the basis of the theoretical study, to analyze the data we have determined five main categories and the respective indicators to study the process of formation of a learning community, namely engagement (in cognitive, socio-affective and reflexive aspect), collaboration (socio-cognitive interactions, socially constructed knowledge), productivity/organization (efficient work organization, efficient problem solving), sense of belonging to the learning community (related to the social presence, creation of a common micro culture, common language, common history) and group cohesion (confidence, support and encouragement between students, empathy, group identity). Due to the amount requirements for the present paper, we will deal mainly with the category of collaboration.

### **Student's Views on Online Collaboration for Developing an Online Learning Community**

Generally, collaboration is related to the socio-cognitive interactions that take place in the framework of learning. The main indicators used to determine the presence of a real collaboration are socially constructed knowledge, efficient and creative exchange, positive and constructive socio-cognitive dynamics, positive interrelation and shared resources. To trace the collaboration process, we have compared the questionnaire data from the beginning and the end of the course, the data from the online observations during the course and the interviews with students during the course, which provide information about the whole learning process at all its stages.

The survey data reveal that almost all students found collaborative work interesting (96%) and useful (92%). Nevertheless, 52% admitted that collaborative work was more difficult than individual and more demanding, especially when carried out online. The reasons for this are, in the first place, organizational difficulties (synchronizing their free time with that of the rest of the team, work organization and management); in the second place, difficulties of cognitive character (joint discussions and reaching a decision distantly, adjustment of work styles); and, in the third place, difficulties of socio-affective character, such as the regulations of interpersonal relations within the team, the need to bear with the rest, tolerate other students' opinions and make compromises in the name of the joint work.

In interviews the students declared: "Working in a team was more difficult for me, because the responsibility was greater. It required more time and effort."; "It was more difficult due to the fact that we could not all be online at the same time or that somebody had problems connecting to the Internet. Otherwise, this type of teamwork was easier, because you could always rely on a team member for help and we corrected each other's mistakes or added something new."; "Team working was more difficult in view of how to make the team work as a partnership, collectively. I think we did a good job. There is something very important - teamwork requires collective thinking and collective responsibility, but without ignoring our own personal responsibility. Having both rights and obligations is very stimulating and leads to good results."; "It's a little more difficult because you have to keep to a certain date and time, observe your colleagues' opinions. Like in real life, isn't it?"

The explanation for the difficulties mentioned above can be found in our students' underdeveloped self-control and autonomy competences as well as in their insufficient collaborative work skills at the beginning of training. In fact, distance learning requires more effort in this respect and more responsibility regarding the management of their own learning. Still, it should be noted that the situation became considerably better after the first teaching unit. According to 95% of the students, their communication and teamwork skills have evolved positively over time.

The online observations reveal that at the beginning of the course the degree of interaction intensity in the different teams and the group was



very low and limited to occasional emails and the compulsory weekly group chats with the tutor. The intensity of interactions gradually increased after certain help, organizational and affective, by the tutor and mostly after the students started viewing the rest of the team as a possible resource for enhancing their knowledge and dealing with the common task.

Communication was mainly with regards to work organization and the joint work on specific tasks, much of it had a cognitive objective (clarification and comments on the course content) and relatively little had a socio-affective character (to maintain good relation in the team).

As can be expected, during individual activities interactions were not particularly intensive and the time that students spent on the platform was relatively little at this stage. The tracks of learner activity on the platform registered by the system show that students entered the platform mainly to use learning materials (sometimes online, but most often to download them on their computers), do interactive exercises or self-assessment tests or deposit their work. They rarely sought help from the tutor or their colleagues when performing individual activities. They relied mostly on the instructions in the learning website, additional resources and the weekly learning chat, where they could ask their questions and receive additional explanations.

The online observations in the platform show that the interactions increased during teamwork, because of the nature of the activities, which required joint work on the tasks. In the first semester, however, they were still chaotic and erratic. Team chats were rare and those that took place were short and not particularly effective. Not all students managed to take advantage of all technological means for collaboration available at the beginning. The main reasons were their poor orientation about the functionality of these means as well as their insufficient experience of online distance work. At this stage, the timely intervention by the tutor was of paramount importance, since this was a critical moment which affected the whole future collaborative online process. After receiving several emails with guidance about the possible means and modes of collaboration and the tutor's comments in the weekly group chats, all students gradually changed the way they worked together and this led to serious improvements after the second semester.

The platform data show that, after the initial period of adaptation, the learners started spending hours together on the platform working on their joint tasks using the version system in the documents deposit area until achieving the desired result and validating the common production. The analysis of the chats shows that the team work chats set up by the team members depending on their free time often turned into a forum for exchange of jokes and comments unrelated to their particular task. In some cases, the chats were combined with Skype sessions, especially when opinions differed greatly or there was little time (some of the students, but not all, unfortunately, documented their sessions and sent them to the tutor so that the collaborative process could be followed).

### Awareness of the Benefits of Collaborative Work

Although they thought collaborative work more difficult, the majority of the students (84%) appreciated its advantages, realized the benefits it carries and were happy with the collaborative focus of the course (Figure 2). What students found attractive in it was that it allows for the exchange and sharing of information, ideas and experience (100%), sharing and/or confrontation of different views (76%), change of views when hearing other opinions (92%), development of teamwork skills (84%), gaining skills to tolerate other people's opinion and argue your point without causing conflicts (72%)

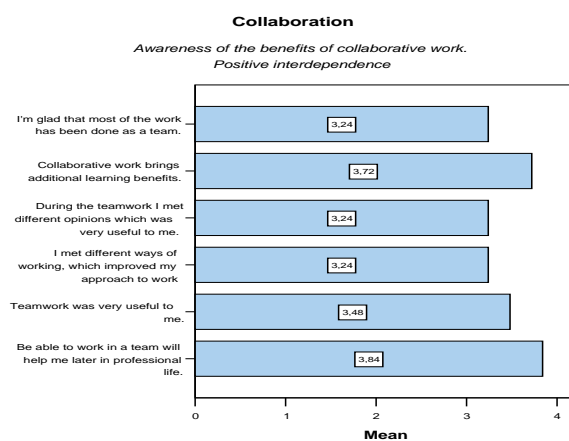
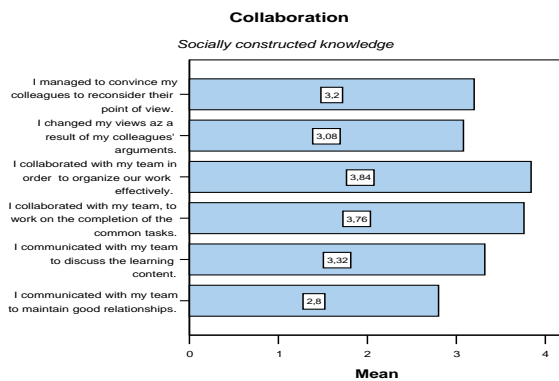


Fig. 2 Awareness of the benefits of collaborative work - Mean values - End-of-course survey.

## Socially Constructed Knowledge

In fact, most students admitted that they had further developed their knowledge learning from other team members, changed their views as a result of somebody else's arguments (84%) and improved their work habits under the influence of a team member, adopting new ideas (92%) (Figure 3).

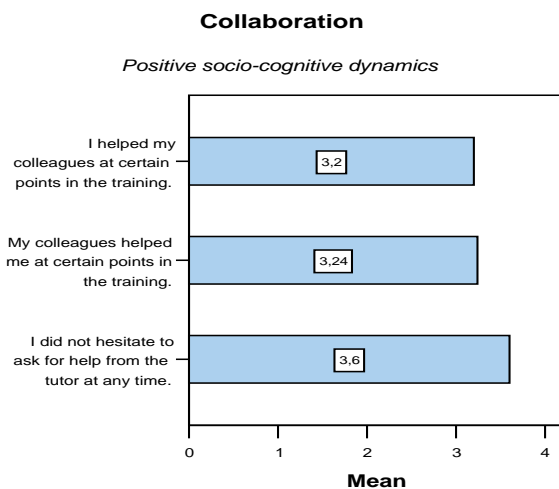


**Fig. 3** Socially Constructed Knowledge

## Positive Socio-Cognitive Dynamics

Here are some opinions given in the end-of-course interviews: "we have learned to work as a team, as it is in real life, and to be more tolerant to different opinions"; "this work brings us together, we share experiences and knowledge"; "you learn to be open-minded, respectful of other people's opinions and work, to be proactive and responsible".

In the questionnaire 84% of the respondents say that they could rely on their colleagues for help when necessary and nearly as many noted that they provided help in a cognitive or affective aspect.



**Fig. 4** Positive socio-cognitive dynamics

Practically, students are unanimous that the establishment of mutual trust and positive atmosphere in the team was important for the successful completion of the work (Figure 4).

Students also expressed their satisfaction at the fact that in most cases they managed to achieve the required quality of joint production, which they would not have achieved if they had worked individually. Besides the richness of ideas and the opportunity to share their experience, what students also found attractive in teamwork was the help they could get from the rest of the team and the tutor.

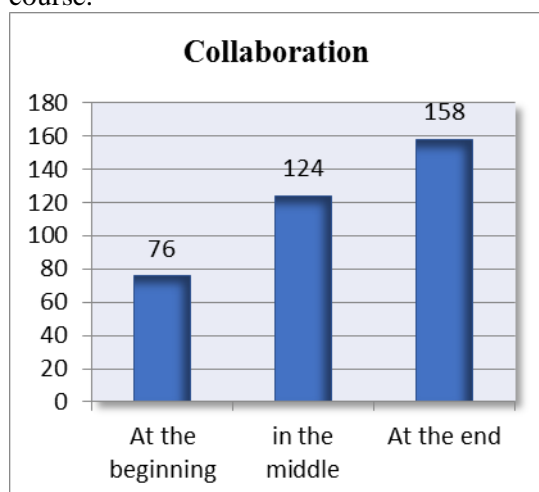
Relatively few students (28%) said they preferred individual work mostly because they considered decision-making from a distance more difficult or liked to rely on themselves when organizing their work. At the same time, only 8% thought that they would have completed their tasks better if they had worked individually. It is an interesting fact that they realized and admitted the advantages of teamwork but were less disposed to collaboration. In the interviews some of them mentioned that they could not see any benefits for themselves because they felt more competent, responsible and involved than the rest and thought they contributed more than they got from the group; others simply said that they did not wish to be engaged in the organization of the learning process or comply with the engagements or methods of work of the others.

As Henri and Cayrol (2003) point out, the disposition to collaboration varies depending on the personality and the expected benefits from this collaboration. Discontent with collaborative work can be explained, on the one hand, with the different ways of work and learning strategies that individual have, especially with regards to the sense of responsibility, accurateness and involvement in the learning process, and, on the other, with the different level of linguistic competence.

Actually, the majority of the students on our course expressed preference for collaborative work. Judging from the analysis of the chat results in the platform and the interviews, collaboration is the category with the highest percentage growth from the beginning until the end of the course (Figure 5).

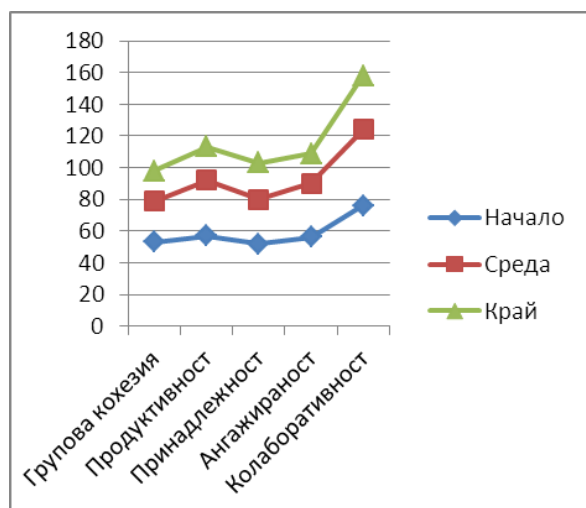
Collaboration is only one of the elements contributing to the formation of an online learning community. It is a complex process that learners go through. Actually, an online learning community develops gradually and has different

characteristics at the different stages of the course.



**Fig. 5** Gradual growth of collaboration (by number of references related to this category) – interviews and chats analysis

The questionnaire data show that the mean values of all categories are higher at the end of the course, the highest growth being that of collaboration (3.44), followed by the sense of belonging (3.43). Engagement, productivity and group cohesion also have similar values. The interviews and online observations data give an even clearer picture of the formation of an online learning community in an online collaborative learning environment. Figure 6 shows the development of the categories at different stages by the number of references related to each category.



**Fig. 6** Formation of a learning community – comparison of results by number of references to categories. Data from interviews and online observations of learners' chats.

The number of references to the different categories of the learning community, calculated by analyzing the contents of the interviews and online observations of the learners' chats, increases with each stage, the highest percentage growth being that of collaboration, followed by engagement.

At the end of the course students state that they felt part of a special learning community that had its own life and rules, had developed its own specific language and had its own place on the Internet, where one could find help or just share something at any time.

Almost all students admitted that they had gladly demonstrated the way they worked and explained what exactly the nature of their study was to their family and friends. They felt privileged to be part of the course and the community.

## CONCLUSIONS

The creation of a learning community and the perception of this community by the learners is an important condition that promotes student learning (Daele & Lusalusa). The sense of belonging to a learning community and the interpersonal relations that are established are motivational factors in collaborative learning (Decamps & al.).

Collaborative learning requires cognitive and metacognitive skills as well as social, psychological and emotional predisposition (Henri et Cayrol 2003). In fact, our students had to learn to work together in collaboration while acquiring knowledge and competences in the subject area.

The students managed to adapt to the new mode of work, which, according to the questionnaire data, helped them not only achieve the course aims in a different, more interesting way, but also develop additional skills such as teamwork in a distance learning environment.

The experience from the conducted study shows that, when applied in a distance learning environment, the Collaborative Approach provides particularly favourable conditions for intensive online interactions and group dynamics promoting the formation of an online learning community, which, in itself, is an indicator of the successful realization of the learning and research objectives set before the course.

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## DUAL EDUCATION - OPPORTUNITIES AND CONDITIONS FOR REALIZATION

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### ABSTRACT

*The aim of the article is to focus on an important issue, which is the development of the economy, namely the interaction between education and business and to track the rewards of both sides for the realization of learning by work (dual education). Relying on the understanding that regional development plays a significant role in this interaction, the work focuses on the concretization of a survey conducted in the Bourgas region among the members of the largest branch organization - the Bourgas Chamber of Commerce and Industry. Business opinions on the possibilities and conditions for the realization of dual education had been studied, the results are summarized and recommendations are made for the implementation of the model.*

**Key words:** dual education, Bourgas Chamber of Commerce and Industry, University Prof. d-r Asen Zlatarov, Bourgas

### INTRUCTION

The thesis of learning, through work, interpreted as dual education, which has been introduced in recent years, raises expectations for a rapid interaction between business and education in order to ensure matching demand and supply. The growing contradiction between the quality of training of young professionals and the professions they are trained in secondary vocational schools and universities, and the requirements of business and economics has led to a serious change in the labor market, new moments in the development of unemployment in its different dimensions (specialists with higher education, specialists with special secondary education, men - women, age characteristics, sectors). The realistic deficits of specialists in certain sectors and excesses in others have led to a serious distortion of traditional ratios and a total disbalance between claims - on the one hand and education on the other hand. The reversed look of both business and education towards practices outside the country has very quickly focused the discussion on dual education, but only assessing its superficial side. The pilot implementation of dual education policy starts but does not reach the dimensions that can cause serious problems. We need to study, analyze and evaluate the specific characteristics of the education system and economic structure that need to be implemented along with the pilot projects to find the most effective model

and identify the most appropriate tools for the purpose.

Dual education places in the curriculum both the standard theoretical training and the mandatory internship in an enterprise depending on the specialty. The benefits of such a form of training are many, as well as for pupils /students who, in addition to receiving a kind of wage (usually between a third and a half of the usual salary), gain practical experience during their studies, and the business on the other hand receive a cheaper labor. As a result, pupils and students go out to work on the labor market, which allows finding a better job for higher wage. Looking at a wider angle, the dual form of learning also plays an important role in the economy of the country applying it, having a direct impact on the reduction of youth unemployment, with all the benefits that follow.

A number of European countries have successfully applied the model. Germany, Austria and Switzerland are the countries with which dual learning is usually associated. These are the countries with traditionally the lowest youth unemployment. The dual system is also known in a number of other countries such as Denmark, the Netherlands, Hungary, Croatia, Australia, China.

Since 2008 a team of lecturers and students from the University "Prof. Dr. Assen Zlatarov - Bourgas together with members of the Bourgas

Chamber of Commerce and Industry annually conducts research on various topical issues concerning business and education, which has built a base for comparison and development of the processes over the years. From today's perspective the progress in improving the interaction business-education is still insufficient to establish positive results in economic growth.

The aim of this paper is to analyze the attitude of business to education from the point of view

of its readiness to be engaged in the process of learning by work and to develop proposals for building a suitable model that can overcome the inconsistencies.

The survey included 31 respondents from the Bourgas District in different economic sectors, and without being representative it, allows conclusions and recommendations to be made.

### QUESTIONNAIRE'S SURVEY

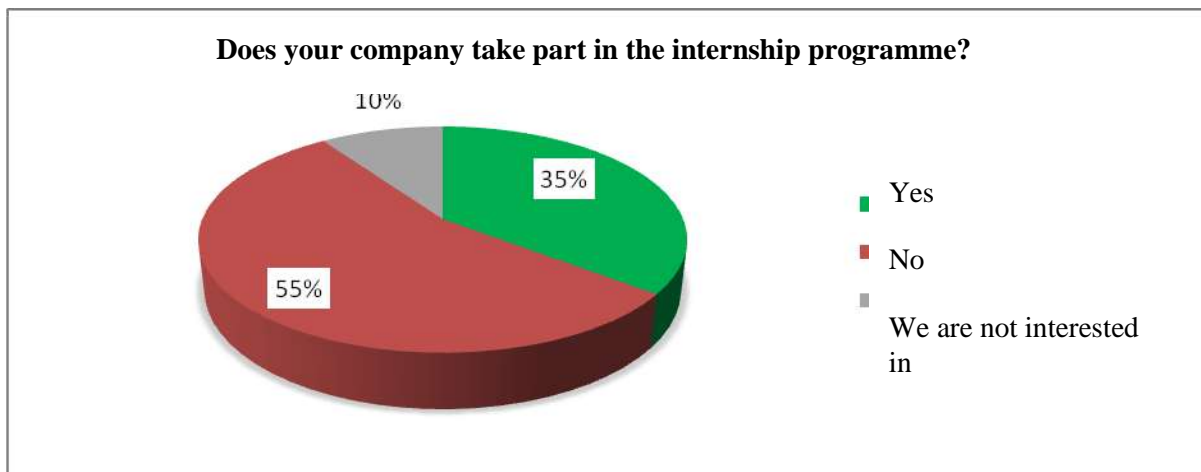


Fig. 1

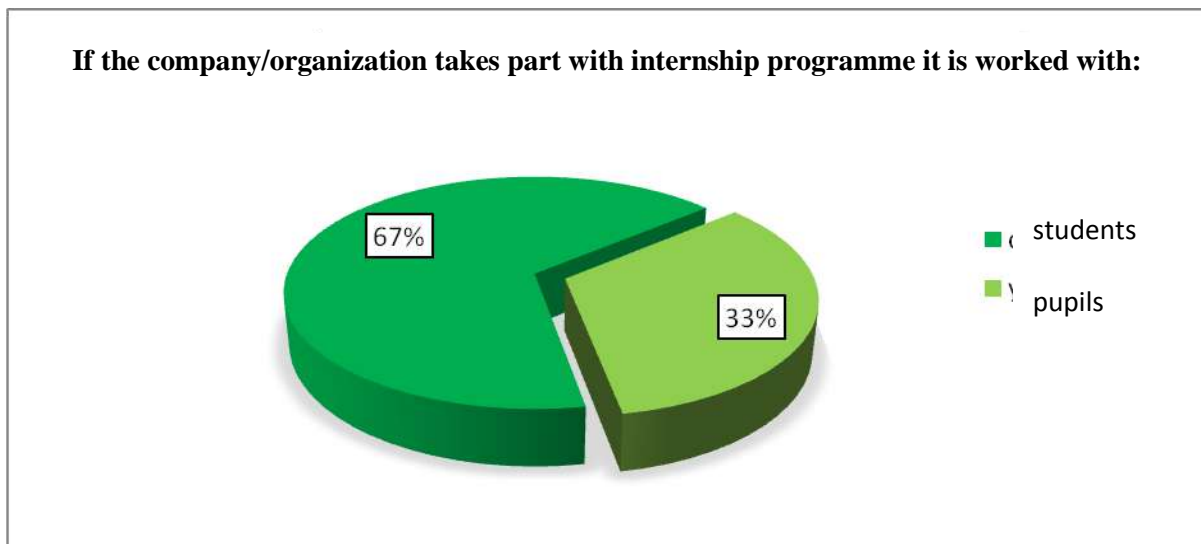
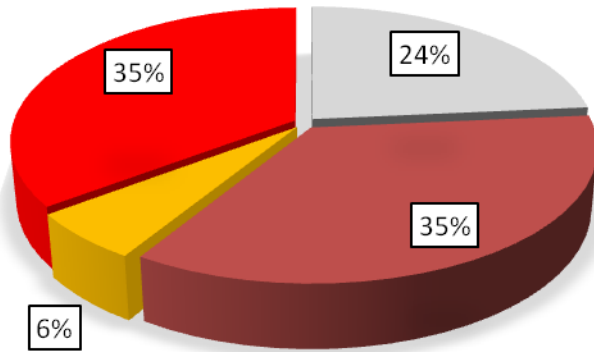


Fig. 2

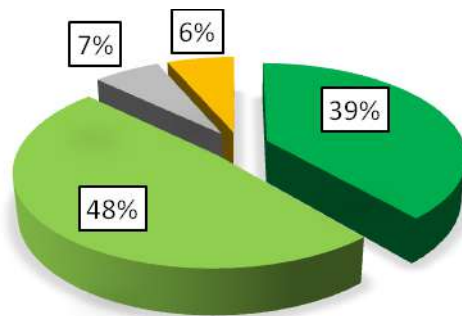
**If the company/organization does not take part in internship programme, the reasons for this are:**



- The company has not enough capacity
- We think that the pupils/students are not well trained
- We find the internship ineffective
- Our experience show that the pupils/students do their obligations in a formal way

**Fig. 3**

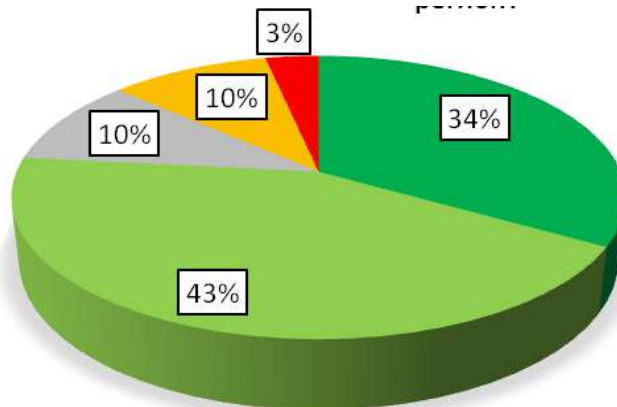
**Are you familiar with the network of the professional gymnasium in your region?**



- Yes
- Rather yes
- Not yes, not no
- Rather no

**Fig. 4**

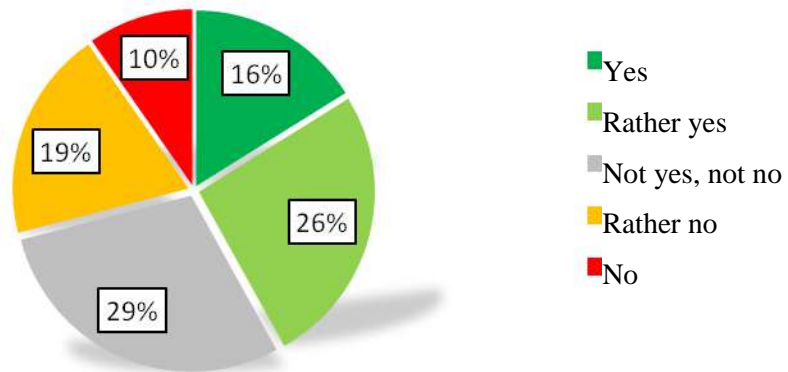
**Are you familiar with the structure of the university education in your region?**



- Yes
- Rather yes
- Not yes, not no
- Rather no
- No

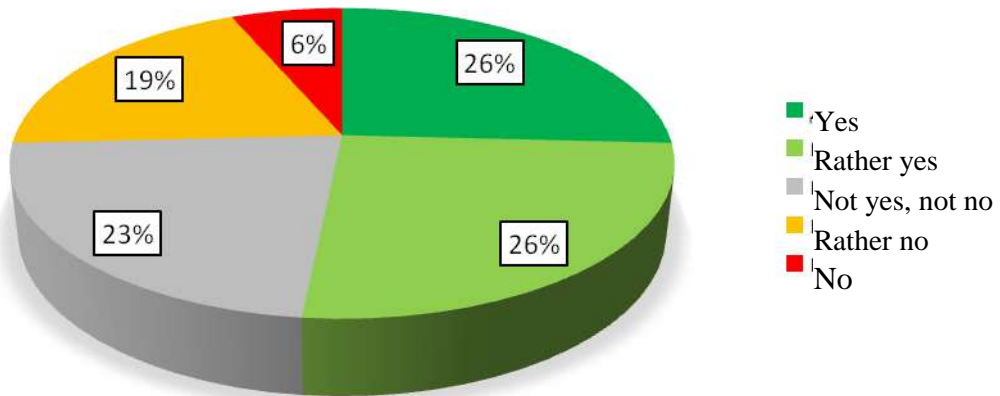
**Fig. 5**

**Are you satisfied with the level of education in the secondary school in the sector in which your company is active?**



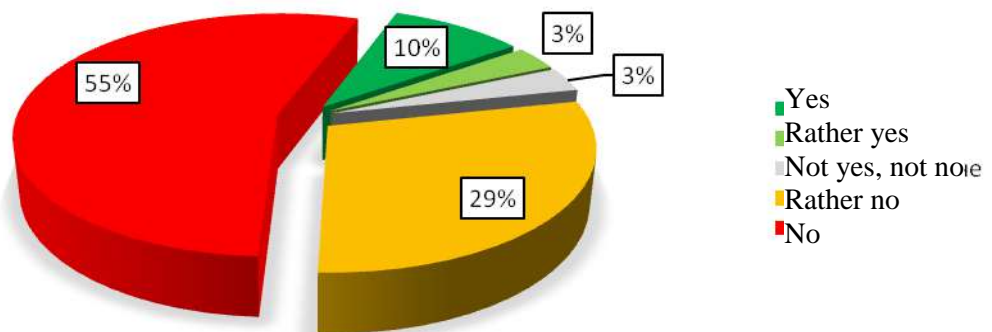
**Fig. 6**

**Are you satisfied with the level of education of specialists with high degrees in the sector in which your company is active?**



**Fig. 7**

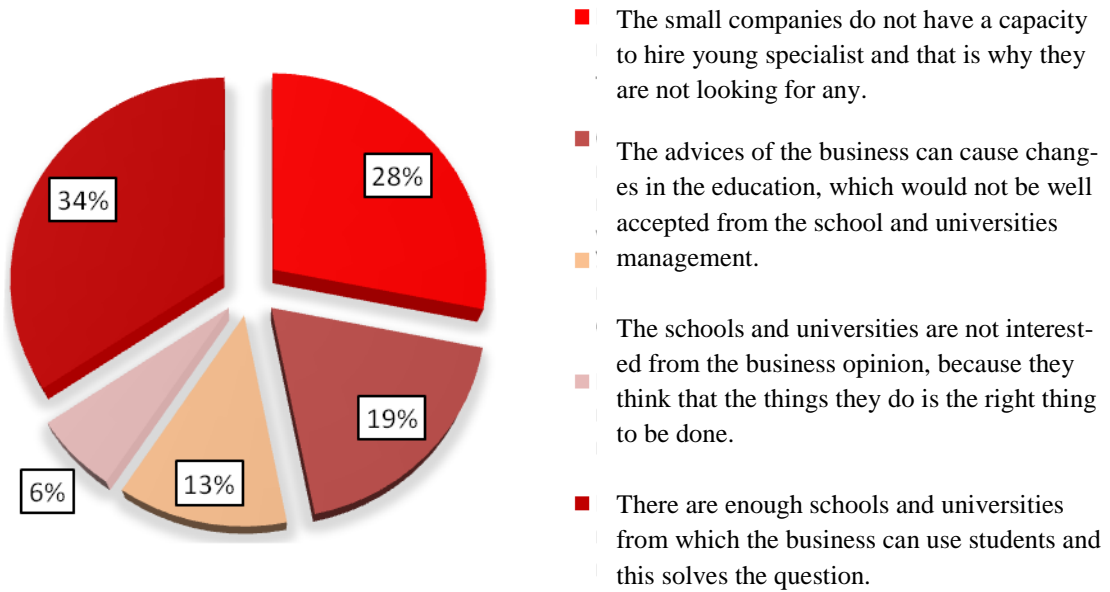
**Is your company wanted from schools/universities for discussions on the educational problems ?**



**Fig. 8**

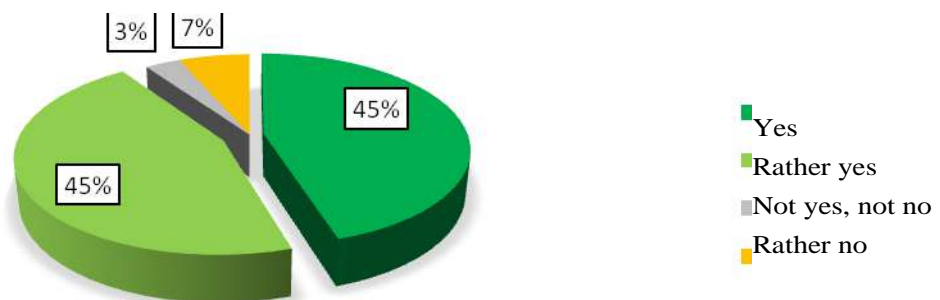


**There is a wide spread belief that there is a strong distancing between the business and the education. Which are the reasons, according to you?**



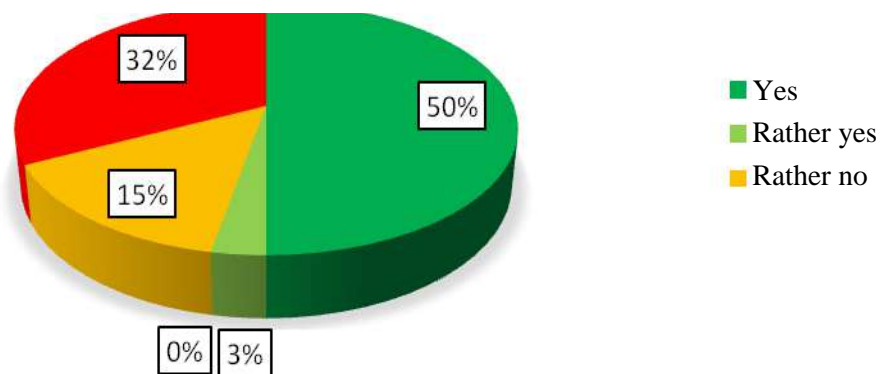
**Fig. 9**

**Do you think that with the help of business, the deficit of the specialists in different areas can be overwhelmed?**



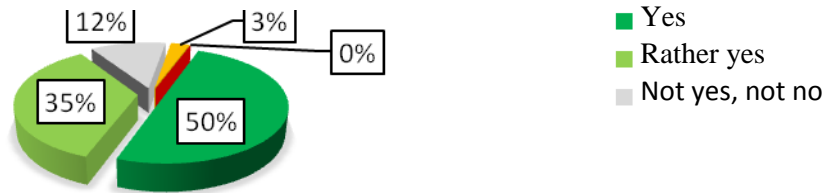
**Fig. 10**

**Did you use university courses for qualification/pre-qualification of your workers?**



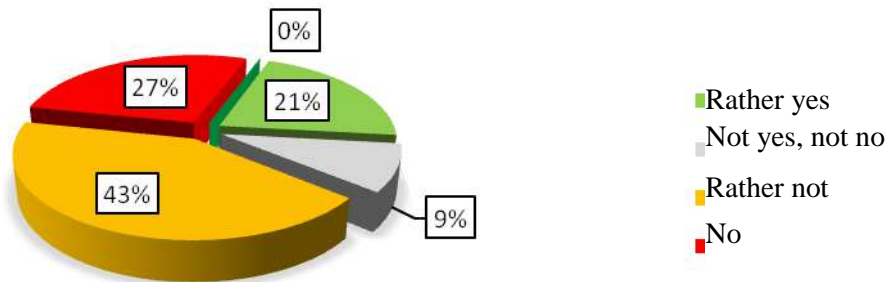
**Fig. 11**

**Do you think that in the additional qualification field, there is a room for interaction between the business and the education?**



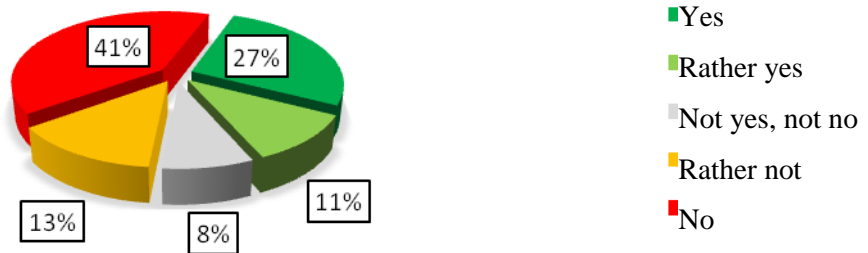
**Fig. 12**

**Are you acquainted with the Law for school education?**



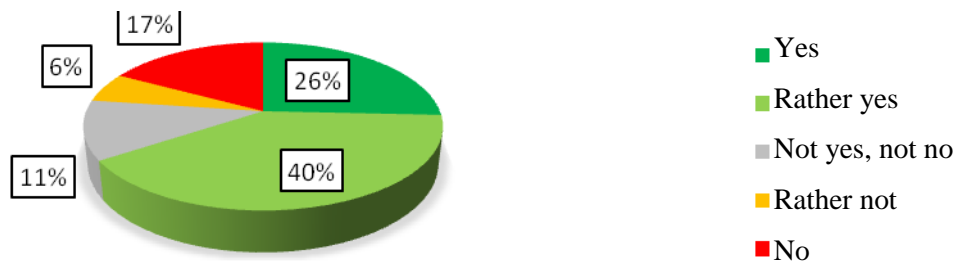
**Fig. 12 A**

**Do you use school and university teachers for organizations of courses/seminars for refreshing of the knowledge of your employees?**



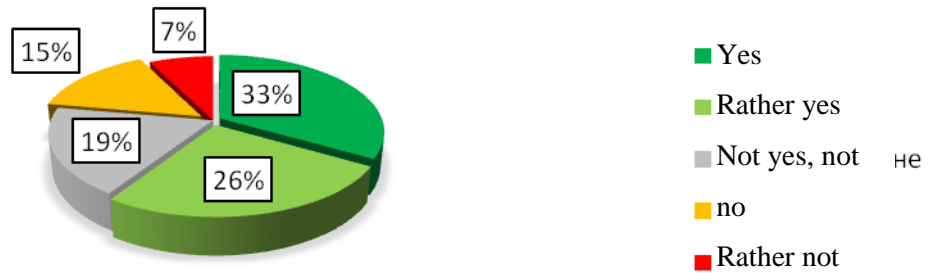
**Fig. 13**

**Do you use have a plan for career development of the workers and employees in your company?**



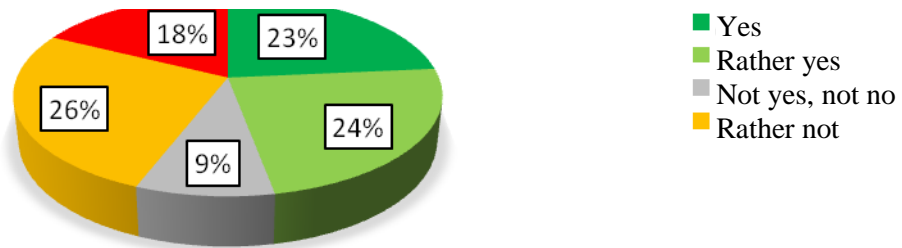
**Fig. 14**

**Do you find any direct connection between the unemployment level and the deficit of cadres in certain sectors?**



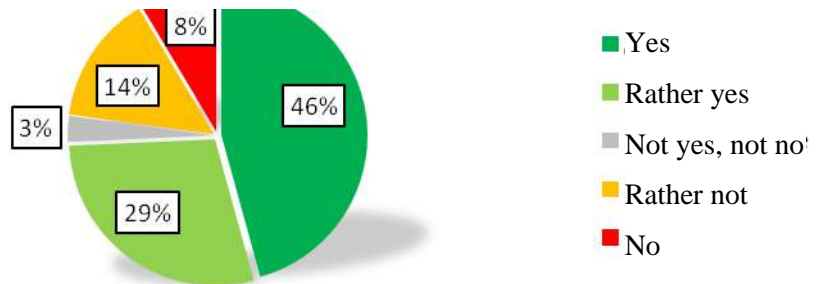
**Fig. 15**

**What is your opinion on the number of universities in our country? Do you think that it is of importance for the quality of the specialists?**



**Fig. 16**

**In case you receive an additional subsidy, would you accept student/pupil on a long period practical education?**

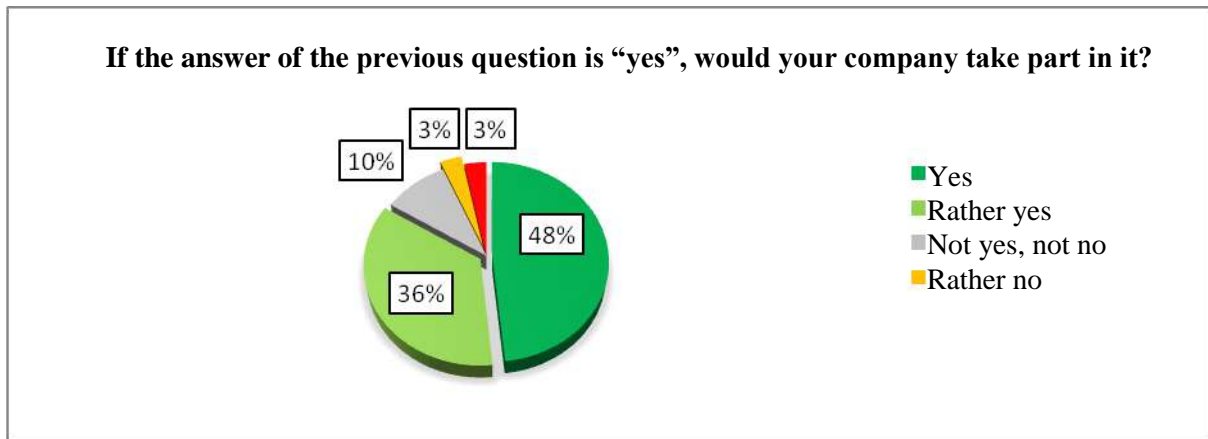


**Fig. 17**

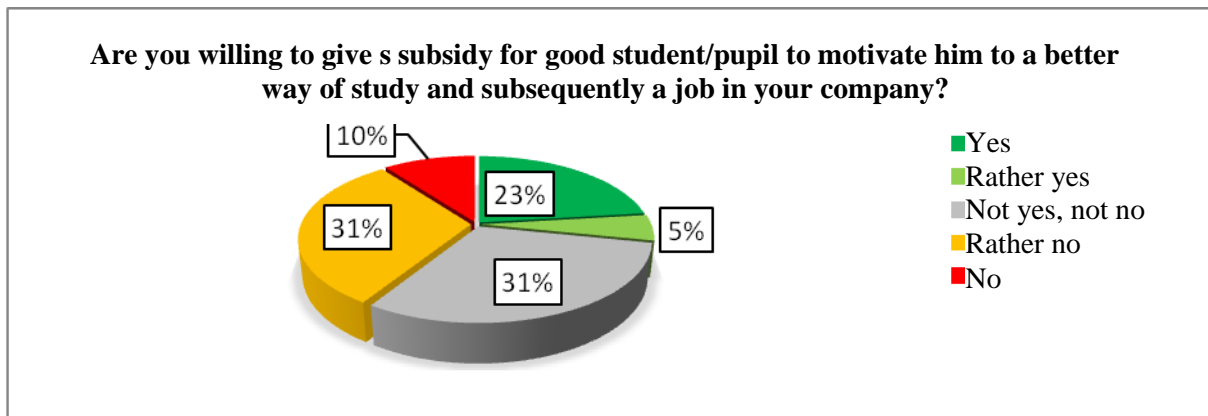
**Do you think that it is a good practice for a business company to be interested from the individual development of a student/pupil for his motivation and starting a business in its structure?**



**Fig. 18**



**Fig. 19**



**Fig. 20**

### ANALYSES OF THE RESULTS

The survey shows that about 1/3 of the surveyed companies actually participate in some kind of dual education, and again 1/3 of those who take part in it, prefer pupils and the other 2/3 prefer students. (Fig.1-2).

The non-participation in the process is motivated by the formal attitude of the pupils and students (35%), their insufficient educational preparation (35%) and the insufficient capacity of the small and medium-sized companies. The opinion of these business representatives is obviously based on common media, internet news or discussions in which they participated. The fact that they have not participated in programs related to learning by work should raise some doubts about this. The important conclusion we need to make from this part of the survey is that most businesses are interested in vocational education, at least in terms of awareness. Around 88% of the respondents, are acquainted with the network of vocational schools in the region, about 77% with the structure of the universities. (Fig. 3 – 4) This is a prerequisite for change of the interest of the business towards different forms of interac-

tion with education. However, the levels of satisfaction with training of specialists with special secondary education (42%) and higher education (52%) are much lower. (Fig. 5-7) This opinion is probably expressed on the basis of own experience that business representatives have from working with employees and workers, graduates of vocational schools or the universities they have employed - a sign that has to be seriously considered by the representatives of education. Here, obviously, work should be done to improve the quality of education and training.

There are many studies on the quality of education and training at national and European level, recommendations for modernizing university education, rethinking vocational education to be applied by educational and university authorities [1,2.]. This is also the case for the rating systems developed for vocational schools and universities at the national level. Another important indicator for the two parties to comply with - 55% of business representatives did not have contacts with educational structures to address their inquires (Fig. 8). In the presence of sufficient accumulated deficits, even in the case of an unclear outcome of the discussion of the prob-

lems, this must necessarily be changed because the precisely participation in debate can lead to the formulation of the problems. This can not be a one-time act, nor is it a matter of independent decisions of one or other leadership, one or another company or institution, even a minister - this is a continuing process and it will always be a challenge for both parties. But it can always lead to partial positive accumulations that at some point will accumulate sufficient resource to solve the problems. No participation in the process does not lead to any decision. Probably, the lack of motivation to take part in discussions is caused by fear of change - the business explains the fact that they are not looking for a debate, with the fear of educational structures that they will have to make changes, they will be deprived of the right to decide themselves what to do and how to do it - in other words, there is a self-sufficiency syndrome in educational structures. (Fig. 9) 34% of respondents think that their recommendations will not appeal to education because it is constantly changed, and 28% think that schools and universities have made immunity to changes. However, businesses are ready to be part of the changes - 90% think they can help overcoming of deficits. (Fig. 10). Through this action, the trends in the development of the different sectors, the professional fields, the professions of priority activity and the skills that the economy needs can be formulated. [3]

A positive fact in business education is the fact that businesses rely on education for upgrading or re-qualification of the workforce (53%), use teachers and trainers for additional employee training and this is considered as a possible field of interaction (Fig. 11-13). The issue of the mutual use of educational staff in business and vice versa in business education is crucial to adapting the two systems to one another as well as their joint response to the principles of competitiveness and technological innovation that the economy is already convening.

The business has a good orientation for its employees and workers, and for the most part develops career development plans that stimulate employees and motivates them to participate more effectively in the company's work. (Fig. 14) This may also be a motivating factor for young trainee specialists or graduates of the relevant educational level, with a guaranteed future development. Nowadays, career development has the role not only of a motivating factor, but it is a tool to re-acquainting of the two countries in order for mutual interest to be justified and predict-

able. Naturally, the issues discussed in the interaction between education and business are related to work - the lack of matching between supply and demand and the gap between the labor market and the education market leads to the lack of realization of the young specialists. (Fig. 15)

This gives rise to another type of suggestion - not only in terms of the quality of education but also in relation to their institutional existence. A total of 47% of respondents believe that the number of universities is important for the quality of training of specialists, which is beginning to form negative positions in terms of university education. (Fig. 16). It is important for the development of the relationship between education and business the interest of business to paid participation in programs for learning by work. On one hand, this is understandable because the business has to use its own resources to implement internship programs, on the other hand the deficits of specialists in certain areas are already worrying enough and will not be solved by outside expectations or by labor input. Businesses are ready to engage in other forms of interaction, such as support and funding of students during their training, or business is ready to "grow up" appropriate professionals. (Fig. 17-20).

## CONCLUSION

Building a model for effective interaction between educational structures and business needs new energy that is already generated and has potential to develop. Perhaps the faster adaptation of the two parties to the changing economic conditions may occur with the participation of local and regional authorities that are relevant to the strategic guidelines for the development of the economy of the regions as well as to the large branch structures experiencing the gaps of the discrepancies on the labor market. Educational structures must also overcome closeness and take the steps that will bring them closer to better realization of their specialists, which is in line with the criteria for assessing their activity. The triangle of Development - Education - Science - Business can be realized, not only by the mutual interest, but also by the necessary legislative changes - those that need the Vocational Education Act and the Higher Education Act. The role of the national institutions, whose responsibilities for the development of the economy will determine the priorities around which will be oriented and the professional directions appropriate for

every educated structure in the region, is very important.

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**SURVEY OF THE STUDENTS' OPINION GRADUATED FROM UNIVERSITY  
PROF. DR ASEN ZLATAROV - BURGAS IN 2016/17 YEAR**

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**ABSTRACT**

*The idea of the article is to summarize and publish the results of a survey of the opinions of students who graduated from University "Prof. Dr. Asen Zlatarov" - Bourgas in 2016/17 school year. The students' opinions, which had been studied are related with the meeting of their expectations from university education, assessment of their education, and their intentions to improve their qualification, for the future.*

**Key words:** *management of human resources, feedback, training, quality, University "Prof. Dr. Asen Zlatarov - Bourgas.*

**INTRODUCTION**

The core of "Japanese management" is group forms for creative participation. The first group form of this kind is the so-called "Small Activities Improvement Groups", known in Japan under the name "Shosudan Katsudo" or "Jishu Kanji Udo". The world literature uses the names of "quality circles", quality control groups (QCGs) or simply "small group activities".

Since 2011 at the University "Prof. Dr. Asen Zlatarov" - Bourgas, we have been conducting annual surveys in different formats through the so-called small student groups to improve the activity. The report includes the results of a study of the opinions of graduating University "Prof. Dr. Asen Zlatarov" - Bourgas students (a small student group for improving the activity) during the 2016/17 academic year. The study was carried out by a team of lecturers and students in all major units of the University "Prof. Dr. Asen Zlatarov" - Bourgas.

**The aim of the article** is to summarize the views of the students who graduate from the University "Prof. Dr. Asen Zlatarov" - Bourgas. We study the opinions of the students: on their expectations on the university education, the evaluation of their education, their intentions to improve their future qualification, etc.?

**The actuality of the article's topic** stems also from the current legislative documents at national and university level:

"Higher Education provides the quality of education and research through an internal system for evaluation and maintenance of the quality of education and of the academic staff, which includes also studying the student's

opinion at least once in the academic year.", Law of Higher Education, Art.6, par. 3 [1].

"*The University introduces a system for evaluating and maintaining the quality of the education and the academic staff, as well as studying and reflecting the student opinion.*", Regulations for the Structure and Activities of the University "Prof. Dr. Asen Zlatarov" - Bourgas, Art. 2, [2]

"*The University will ensure the quality of education and research through an internal system for assessment and maintenance of the quality of education and of the academic staff* ("Quality Evaluation and Maintenance Training System"), which will include study of students' opinion in accordance with Art. 6, par. 4 of the Law on Higher Education. "[1], Regulations for the Structure and Activities of the University" Prof. Dr. Asen Zlatarov" - Bourgas, Art. 41 in [2].

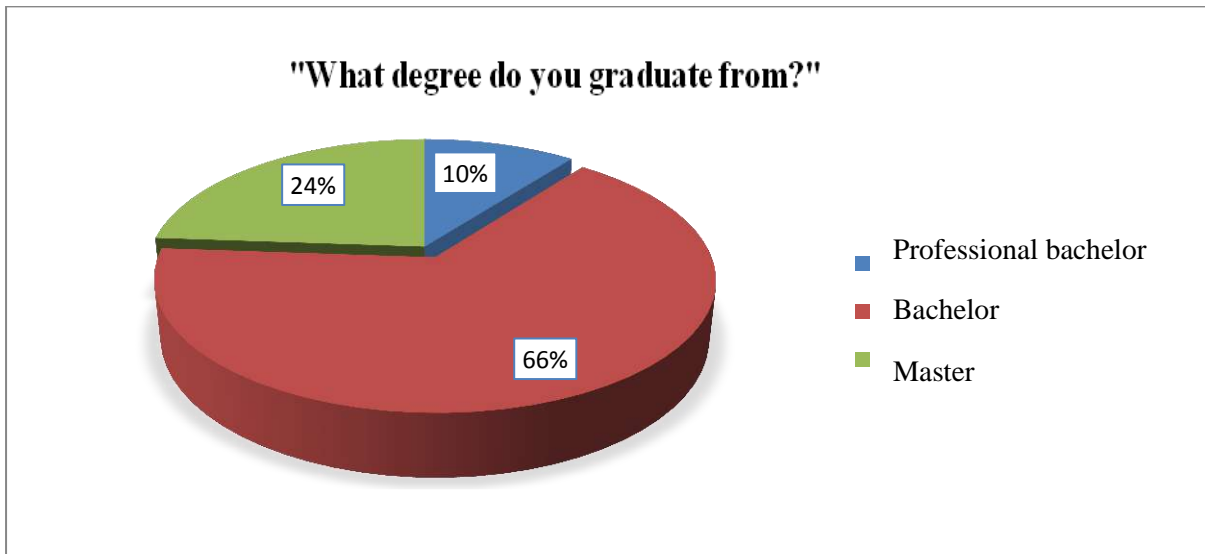
"*Students have the right to express free media about the quality of the teaching process and the administrative service*", Regulations for the teaching activity of the University "Prof. Dr. Asen Zlatarov" - Bourgas, Art. 50 (1) [3].

**QUESTIONNAIRES, CONCLUSIONS AND RECOMMENDATIONS**

We conducted a survey on the opinion of part of the students graduating from "Prof. Dr. Asen Zlatarov" - Bourgas in 2016/17 school year, using "Questionnaire 4 Survey of Final Students' Opinion on the Demand for the Educational Product of the University of Rousse"[4]. The study was conducted by a team of lecturers and students - 45 graduates (21

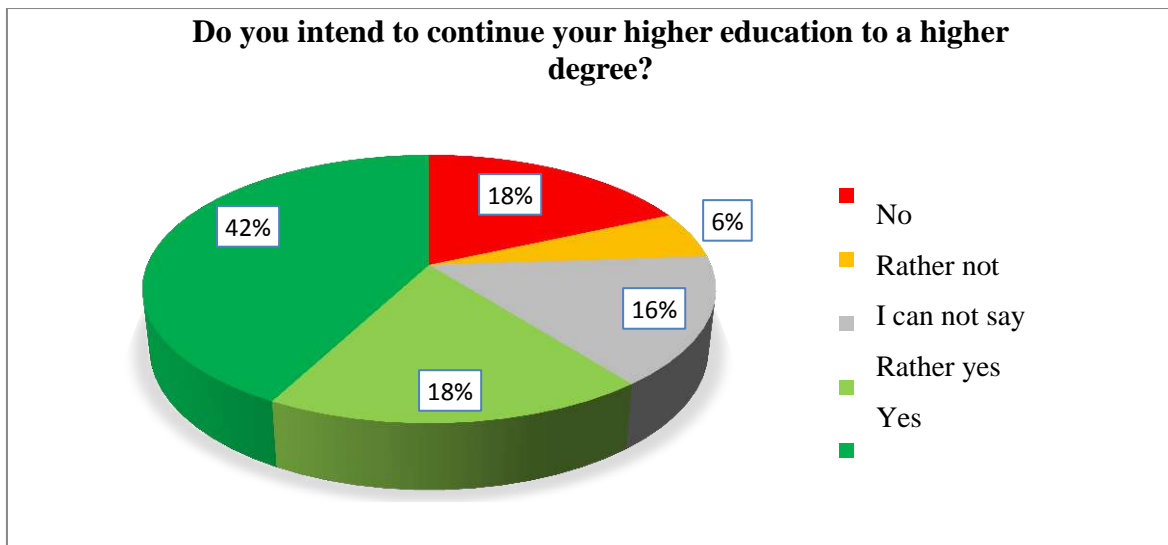
students and 24 students), of all educational-qualification degrees from all major units of the

University "Prof. Dr. Asen Zlatarov" - Bourgas (which make up about 10% of the graduates).



To the question "What degree do you graduate from?" The respondents answer:

bachelor - 66%, master - 24%, professional bachelor - 10%.

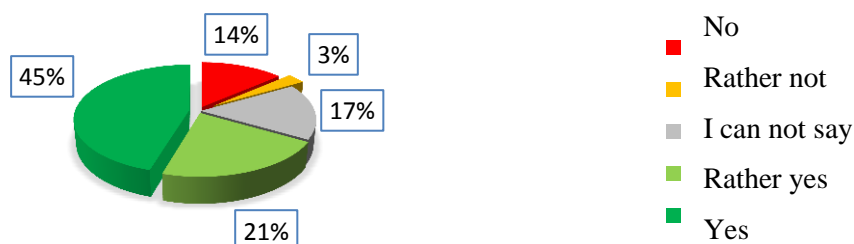


To the question, "Do you intend to continue your higher education to a higher degree?" Students give the following answers: yes - 42%, rather yes - 18%, I can not say - 16%, rather not - 6%, no - 18%.

**Conclusion** The majority of respondents (60%) indicate that they intend to continue their education. Nearly every fourth of the students (24%) said they would not learn any more, and 16% did not make a final decision



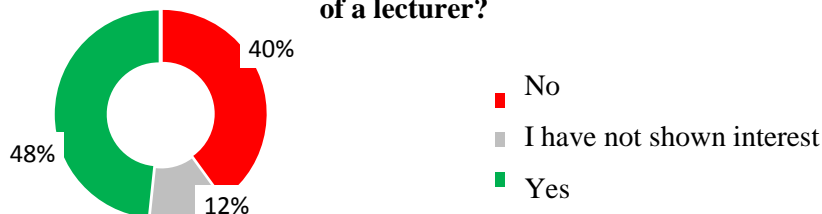
**If you intend to continue your higher education to a higher degree, would you do that at the University" Prof. Dr. Asen Zlatarov "Burgas?**



Responding to the question, "If you intend to continue your higher education to a higher degree, would you do that at the University" Prof. Dr. Asen Zlatarov "Burgas? we received the following answers: yes - 66%, no - 17%, I can not say - 17%.

**Conclusion** Two-thirds of students (66%) say they would continue their education at Prof. Dr. Asen Zlatarov "Burgas, but every third student does not give an affirmative answer.

**Have you participated in research and applied studies under the guidance of a lecturer?**



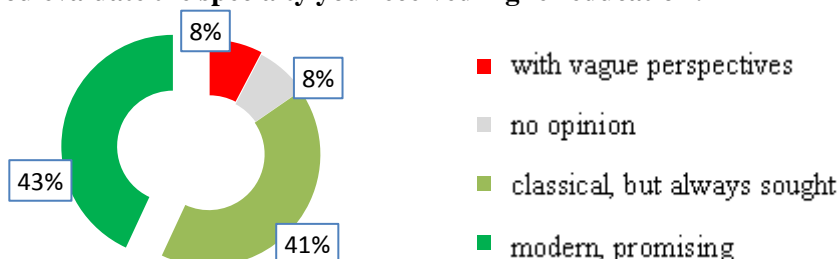
Responding to the question "Have you participated in research and applied studies under the guidance of a lecturer? we received the following answers: yes - 48%, no - 40%, I have not shown interest - 12%.

engage in research and development activities during their studies at the University

**Recommendation** To endeavor to involve a larger number of students in the university's research and development system.

**Conclusion** It makes a good impression that we have covered almost half of the students to

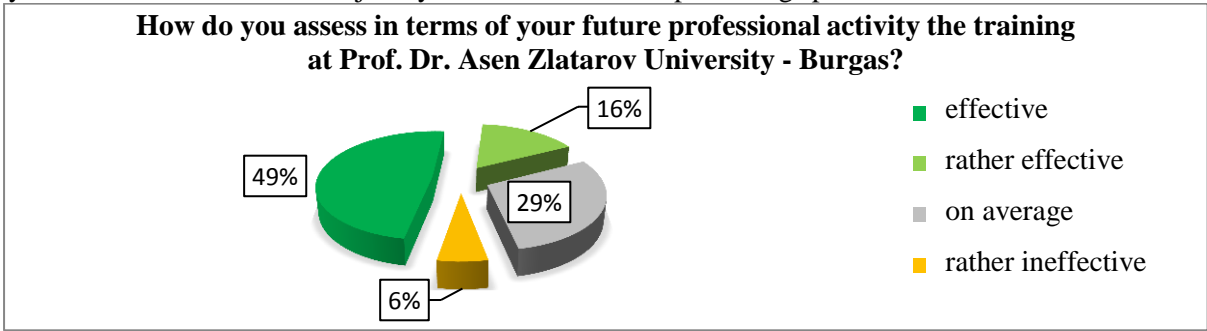
**How do you evaluate the specialty you received higher education?**



Responding to the question "How do you evaluate the specialty you received higher education?", The students share: modern, promising - 43%, classical, but always sought - 41%, with vague perspectives - 8%, no opinion - 8%.

**Conclusion** 84% of the students surveyed indicate that the specialty they graduated is modern, promising and classical but always sought after. Only 8% believe that their specialty is with vague perspectives and 8% do not express a specific opinion.

**Recommendation** We need to make expectations by continuing to develop up-to-date systematic efforts to justify students' and promising specialties.

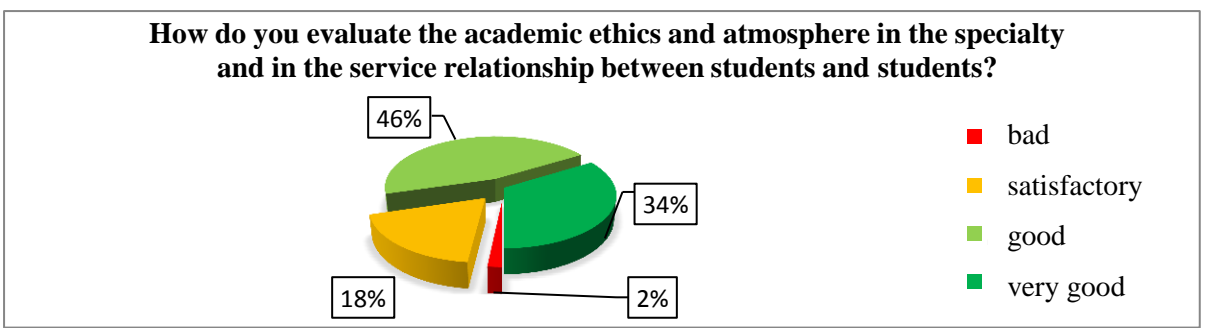


To the question "How do you assess in terms of your future professional activity the training at Prof. Dr. Asen Zlatarov University - Burgas?", The responses are: effective - 49%, rather effective - 16%, on average - 29%, rather ineffective - 6%.

University as effective, about one-third (29%) - average and 6% - ineffective.

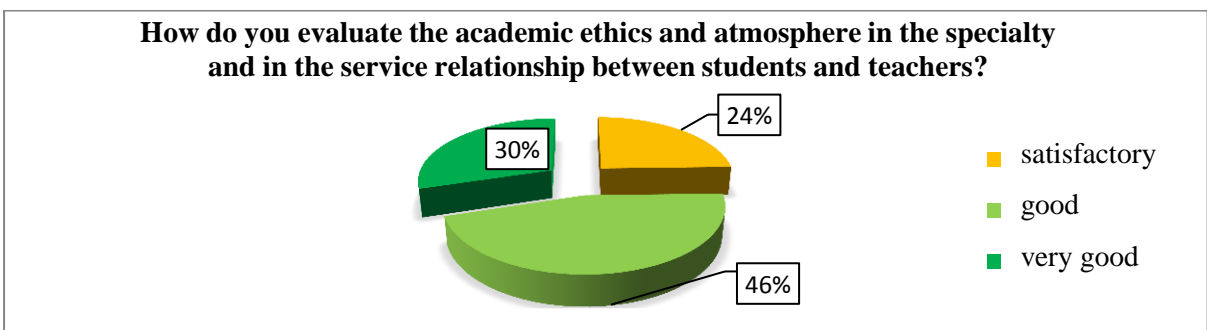
**Recommendation** We need to implement modern information technologies in learning to make it effective and to inspire and inspire our students.

**Conclusion** Around two-thirds of respondents (65%) rate their education at the



To the question "How do you evaluate the academic ethics and atmosphere in the specialty and in the service relationship between students and students?" The answers are: Very good - 34%, good - 46%, satisfactory - 18%, bad - 2% .

**Conclusion** 80% of the students appreciate the academic ethics and atmosphere in the specialty and in the relations between students and students as positive (very good and good), 18% define it as satisfactory and only 2% bad.



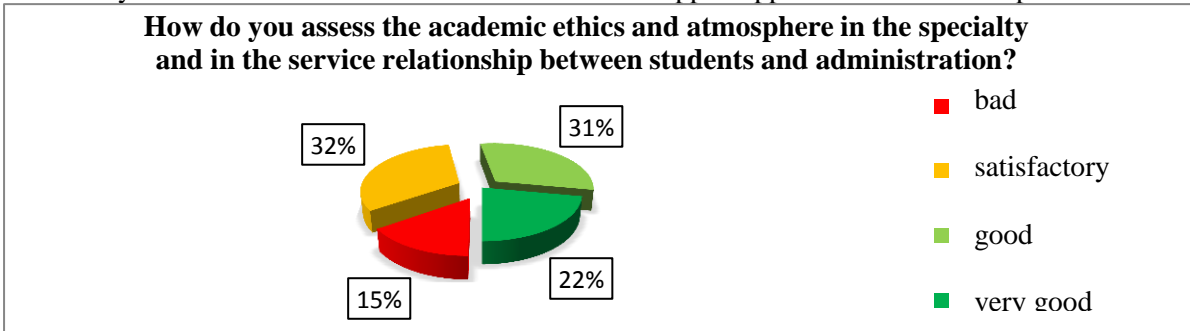
Responding to the question "How do you evaluate the academic ethics and atmosphere in the specialty and in the service relationship between students and teachers?" The answers

are: very good - 30%, good - 46%, satisfactory - 24%.

**Conclusion** Almost three-quarters of the graduates assess the academic ethics and atmosphere in the specialty and in the service

relations between students and teachers (very good - 30% and good - 46%) as positive (76%). But almost a quarter (24%) rated it as satisfactory.

**Recommendation** We need to improve our work with students, including through the newly introduced tutorial system. There are many untapped opportunities in this respect.

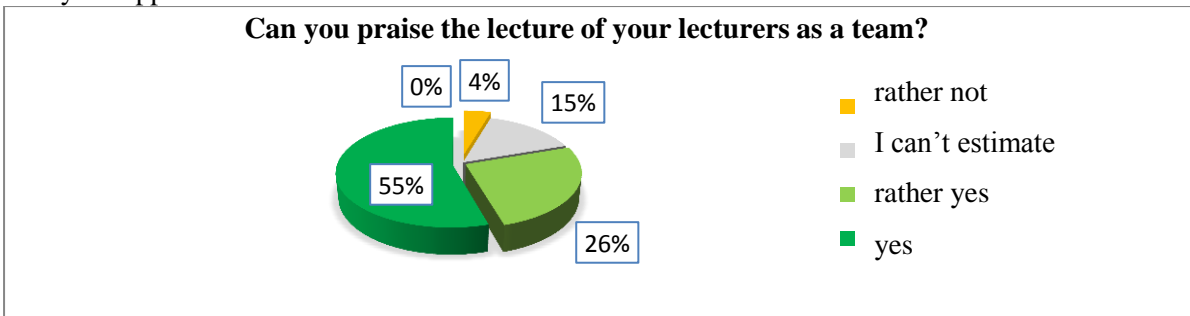


The answers to the question "How do you assess the academic ethics and atmosphere in the specialty and in the service relationship between students and administration?" The answers are: Very good - 22%, good - 31%, satisfactory - 32%, bad - 15%.

atmosphere in the specialty and in the service relationship between students and administration as bad and 32% as satisfactory.

**Recommendation** We need to use the existing potential capabilities of the administration in this regard.

**Conclusion** It is striking that 15% of students surveyed appreciate the academic ethics and

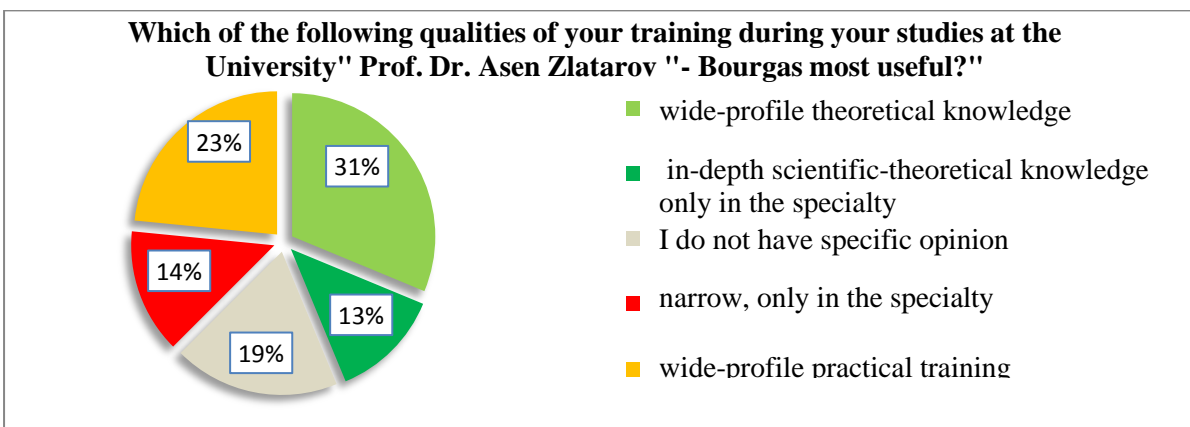


Answering the question "Can you praise the lecture of your lecturers as a team?", students share yes - 55%, rather yes - 26%, I can not estimate - 15%, rather not - 4%.

"rather not" and 15% do not express a specific opinion.

**Recommendation** We need to refine our business to inspire our young colleagues

**Conclusion** 81% of respondents give us a positive assessment, but 4% share the answer



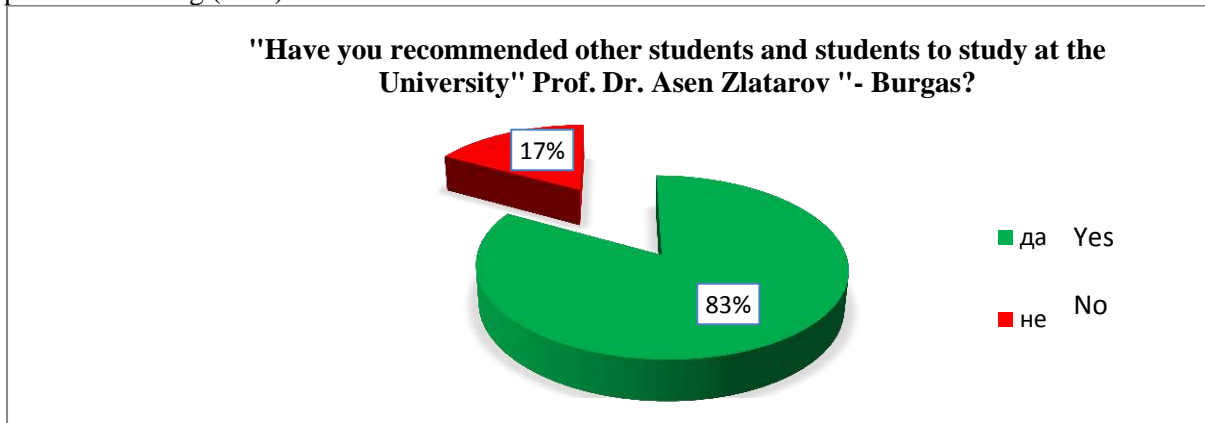
To the question "Which of the following qualities of your training during your studies at the University" Prof. Dr. Asen Zlatarov "-

Bourgas is most useful?" respondents give the following answers: wide-profile theoretical knowledge - 31%, wide-profile practical training

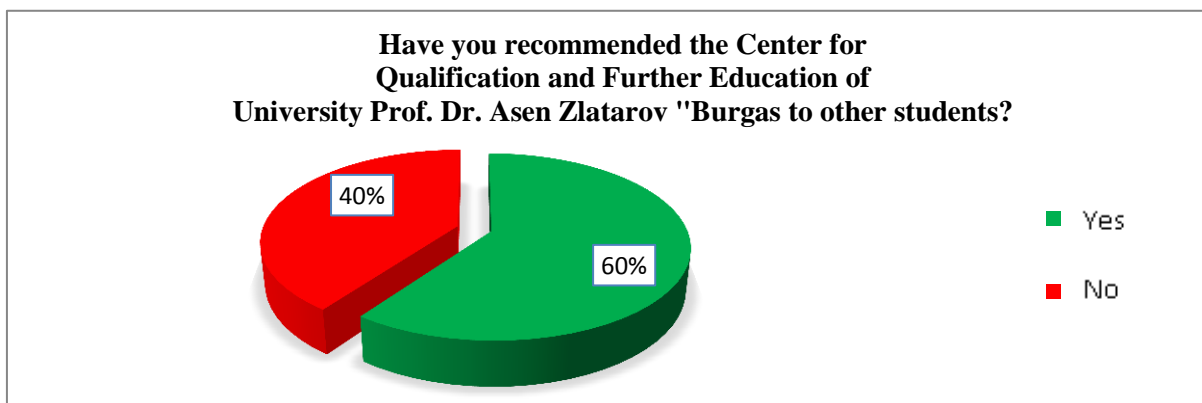
- 23%, narrow, only in the specialty - 13% and do not express a specific opinion 19%.

**Conclusion** The results confirm the view that we spend more time on the theoretical preparation of students (44%) at the expense of practical training (37%).

**Recommendation** We need to pay more attention to the practical training of our students in order to adapt more quickly to the requirements of the labor market.



To the question "Have you recommended other students and students to study at the University" Prof. Dr. Asen Zlatarov "- Burgas? The graduates answer: yes - 83%, no - 17%.

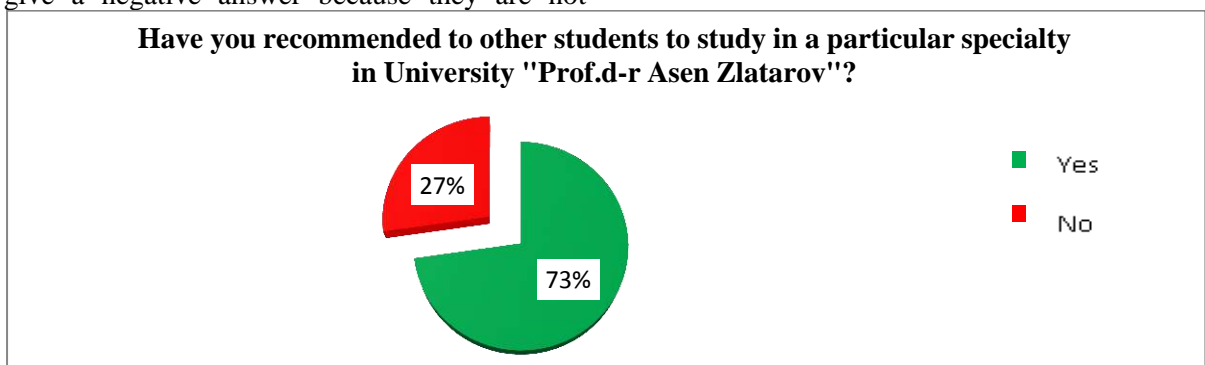


To the question "Have you recommended the Center for Qualification and Further Education of University Prof. Dr. Asen Zlatarov "Burgas to other students? respondents answered: yes - 60%, no - 40%.

familiar with the activities of the qualification center.

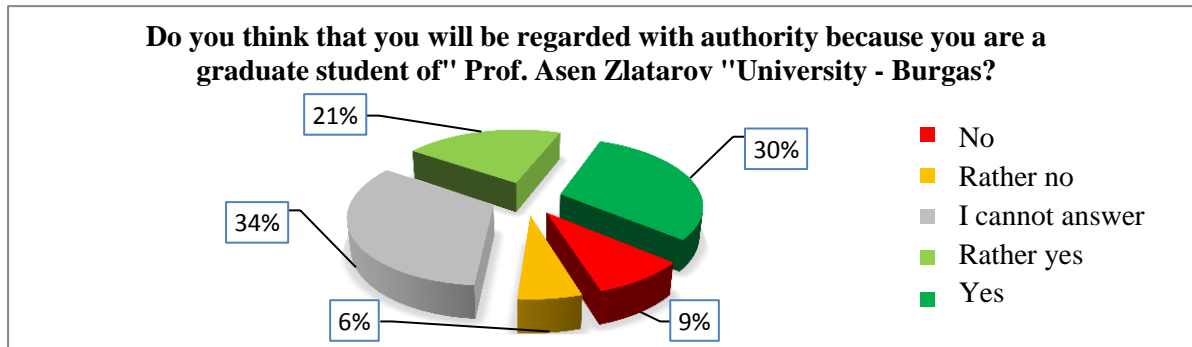
**Conclusion** According to us, 40% of students give a negative answer because they are not

**Recommendation** It is necessary to promote among the students all forms of education offered by the University "Prof. Dr. Asen Zlatarov "- Burgas.



To the question "Have you recommended to other students to study in a particular specialty in University "Prof. d-r Asen

Zlatarov? respondents answered: yes - 73%, no - 27%.

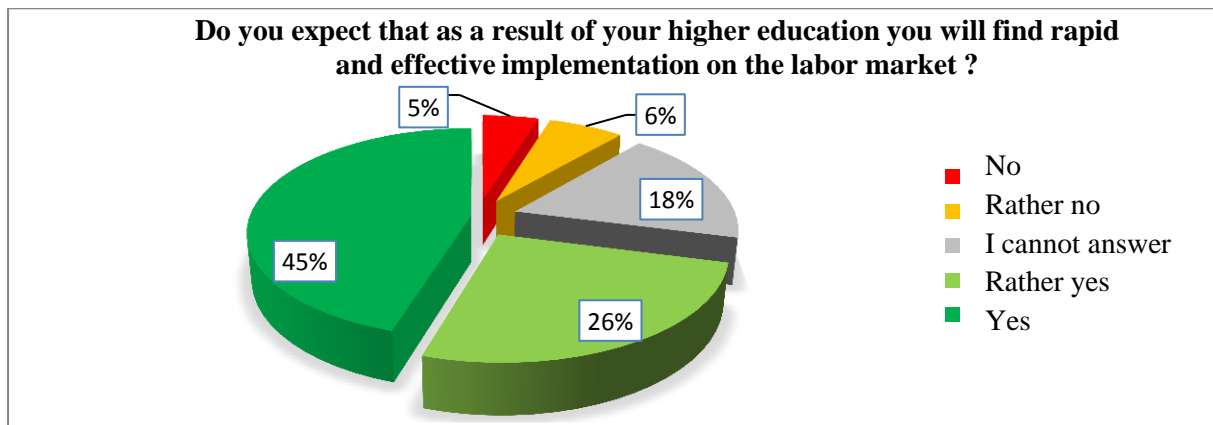


To the question "Do you think that you will be regarded with authority because you are a graduate student of" Prof. Asen Zlatarov "University - Burgas? 30%, of the respondents answer "yes", 21% rather yes, 9% answer no, 6% - rather no, and 34%.can not estimate.

authority because they are graduates of "Prof. Asen Zlatarov" University of Burgas. The opposite is 15%, and more than a third (34%) can not estimate.

**Conclusion** More than half of our graduates (51%) consider that they are regarded with

**Recommendation** To treated with authority the alumni of our University, needs to have necessary knowledge, skills and competence. Our calling is to obtain it.

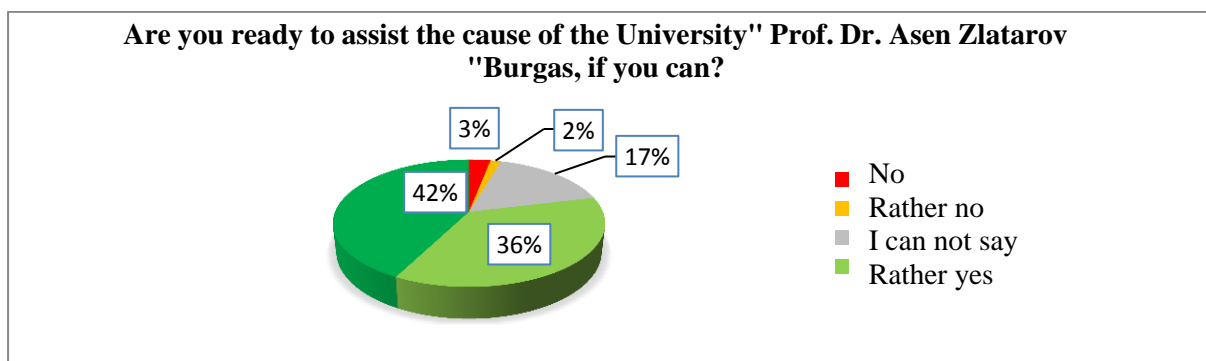


Responding to the question, "Do you expect that as a result of your higher education you will find rapid and effective implementation on the labor market ?", we received the

following answers: yes - 45%, rather yes - 26%, no - 5% rather no - 6%, I can not answer - 18%.

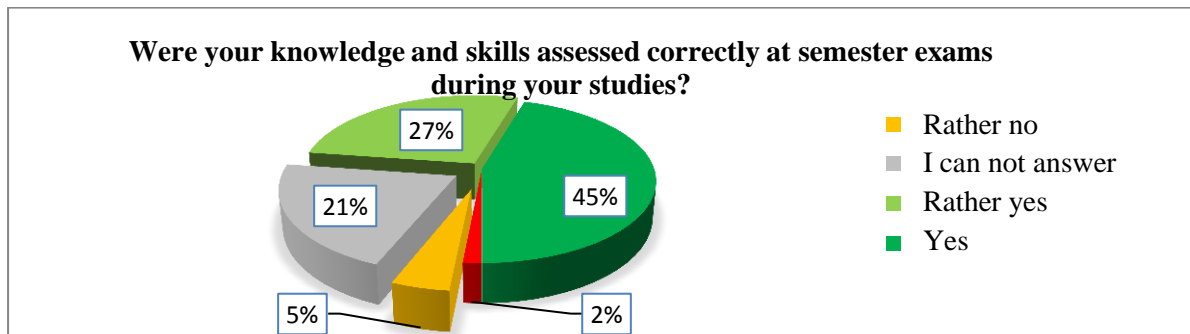
**Conclusion** Our graduates are optimistic -

71% and pessimistic - 11%, with 18% failing to give a specific answer.



To the question "Are you ready to assist the cause of the University" Prof. Dr. Asen Zlatarov "Burgas, if you can? the responses are: yes - 42%, rather yes - 36%, no - 3%, rather not - 2% and I can not judge - 17%,

Conclusion It is glad that 78% of our graduates are ready to support the "cause" of the University "Prof. Dr. Asen Zlatarov "Burgas, if they can.

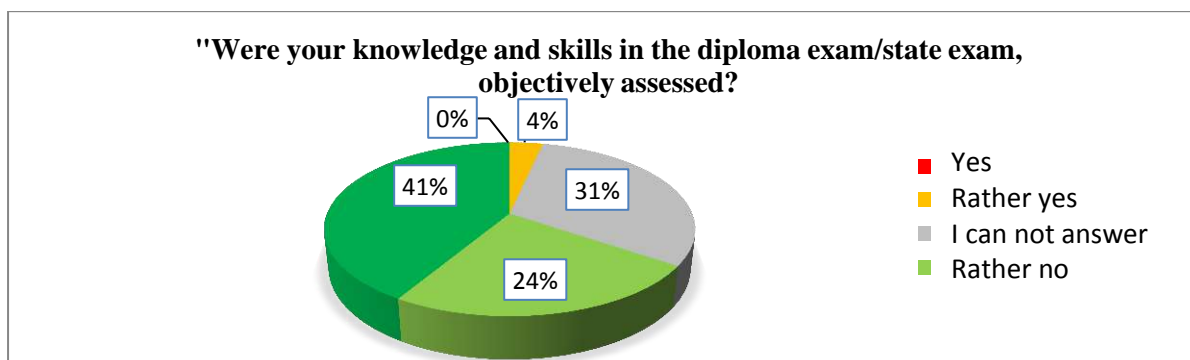


To the question "Were your knowledge and skills assessed correctly at semester exams during your studies?" the answers are: yes - 45%, rather yes - 27%, no - 2%, rather no - 5% and I can not judge - 21%.

**Conclusion** Over two-thirds of our students (72%) believe that their knowledge and skills at the semester examination have been objectively assessed during their studies. The opposite is 7% and every fifth student (21%) can not answer.

To the question "Were your knowledge and skills assessed objectively at semester exams during your studies?" the answers are: yes - 45%, rather yes - 27%, no - 2%, rather not - 5% and I can not answer - 21%.

**Conclusion** Over two-thirds of our students (72%) believe that their knowledge and skills at the semester examination have been objectively assessed during their studies. The opposite is 7% and every fifth student (21%) can not answer.



Answering the question "Were your knowledge and skills in the diploma exam/state exam, objectively assessed?" The graduates share: yes - 41%, rather yes - 24%, I can not estimate - 31%, rather not - 4%.

**Conclusion** Almost two-thirds of our students (65%) believe that their knowledge and skills in the diploma defense / state exam were objectively assessed. On the contrary, they are 4% and almost one-third (31%) can not answer.

**Summarizing Conclusion** The conducted survey provided useful analysis information.

**Summarizing Recommendation** It is necessary that such surveys to be organized at the "entance" and "exit" of the University "Prof.

Dr. Asen Zlatarov" – Bourgas and to become part of the "standard of work" of the University and to be held annually.

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## CONFLICTOLOGY OF OUTSOURCING

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### ABSTRACT

*This paper investigates the other side of outsourcing interaction – the one of conflictology. The focus is on the relationships in the outsourcing process, inconsistencies, contradictions and conflicts.*

**Key words:** *outsourcing, disagreements, conflicts*

### INTRODUCTION

Outsourcing has established itself as a successful form of interaction between big and small businesses [1]. In practice, along with the positive aspects of this cooperation certain risks arise [4].

An organization wishing to receive outsourcing services [2] establishes which suppliers are suitable partners, exchanges information with them, and negotiates specific parameters. By creating competition between candidates, the contracting authority makes its choice to outsource activities. It makes a plan for the main sections and stages for implementation of outsourcing. It evaluates and verifies the requirements, the outsourcing projects are specified [6], the terms and penalties are set. The fact [3] that more than a third of the outsourcing contracts are not renewed indicates the presence of dissatisfaction.

Concept of interests and outsourcing [5]. The refusal of the organization to undertake the relevant activity alone determines the demand of a contractor for a more qualitative implementation, as specialized organizations offer appropriate quality. The total outsourcing interest is defined, which determines the convergence between the client organization and the candidates wishing to take up the activity.

The existence of a common interest redirects the negotiations towards presenting the opportunities for potential contractors and detailed specification of outsourcing options. Any particular agreement jointly reached by compromise or consensus enhances outsourcing cohesion between the customer and the supplier. Specific correlations between different but compatible

interests are formed, as well as a mutual particular interest.

Respectively, any disagreement on specific parameters provokes the appearance of conflicting interests that cause misunderstanding and separation with most candidates. The client organization selects a supplier. The resulting agreement on the details of the transfer of the activity determines the consolidation between the parties regulated by the outsourcing contract [6].

### SUMMARY

Subjects of outsourcing contradictions [3] are the outsourcing developer and contractor. According to the outsourcing process, they appear in cases of contractual relations, contradictions within the organisation of the outsourcing client in relation to service delivery and performance of the contract.

1) Disagreements in contractual relationships between outsourcing customer and performers: only internal departments will deal with determining the service needs, their allocation, coordination and control of their implementation on the one hand and on the other, an external organization will be assigned to take care of a greater part of these activities in collaboration with internal departments; expectations of the economic organization for attractive offers for performance of services to external entities and abilities of external organizations to meet expectations; expectations of candidates for bidding proposals and actual offers.

Dilemmas: The internal department has partial rights for coordination and control in execution of specific activities – it has full rights; when selecting candidates competitive form of selection to be used – offers to be made directly

to proven organizations; for each particular need of services to seek only one contractor - at least two; conducted selection of outsourcing provider is objective - it is subjective; the interests of the outsourcing customer/contractor in connection with the subject of the eventual contract are protected - they are not.

2) Intra-organizational disagreements of the client in connection with the provision of services of the contractor occur mostly when requesting structural units and accepting requests from the internal department in collaboration with the outsourcing contractor. They are tied with the specifics of the particular request.

They can be synthesized in the following general contradiction: the requirements of the contractor to the agreed regulations for the submission of requests for services, and the client to meet these requirements on the one hand and on the other, the requirements of the client with regards to agreed regulations on the acceptance of requests and the ability of the contractor to accept these requests.

Dilemmas: the request is submitted on time – it is not submitted on time; the requesting procedure is followed – it is not complied with; the request is made professionally – it is not.

3) The disagreements in the performance of the contract are summarized as follows: between the expectations of the client for the provision of the service on the one hand and on the other, the expectations of the contractor to receive an appropriate reward.

Dilemmas: the obligation is fulfilled on time – it is not; provided access to production is adequate – it is not provided adequately; payment is made on time – it is not.

In the process [6] of implementing the outsourcing agreement inconsistencies appear sooner or later. They reflect the specific irregularities which predetermine changes in pre-established arrangements. The very dynamics of outsourcing is perceived as a source of inconsistencies. Outsourcing disagreements related to the specific problematic inconsistencies arise.

Outsourcing disagreements turn into degrees of conflict [7]: the occurrence of differences in interests and views on how to overcome the inconsistency, but there is unity in the views of the parties on the necessity of solving the problem; when polarization arises extremely opposing views on the methods to resolve the discrepancy are formed, but the unity of opinion about the necessity of solving the problem remains; the clash is characterized by extreme disparity not

only on the means and ways of bridging the gap, but also on the mutual benefits that arise from it.

Specific mutual interest is destroyed; antagonism - irreconcilability between the parties, leading to the breakdown of total outsourcing interest, to the collapse of outsourcing relationships. The unity of outsourcing opposites and the struggle of outsourcing opposites at times of outsourcing disagreements are in (relative) balance, while in outsourcing conflicts the struggle of outsourcing opposites dominates over the unity of outsourcing opposites.

The outsourcing conflict is a socio-economic process, with outsourcing disagreements at its basis. The outsourcing conflict includes a crisis in outsourcing relationships. It is inherent in its levels of confrontation and antagonism.

Outsourcing conflicts as a form of manifestation of the contradictions between outsourcing client and outsourcing contractor of a separate function or business process caused by different interests, goals and needs arise and are an integral part of the outsourcing relationship. According to the type of controversy there are three groups of outsourcing conflicts [3].

1) Conflicts arising at the start of contractual relations. Conflicts arising based on the subject matter of the contract – the main conflict-arising zones are: the way the assignment is made by the client and consent of the contractor given to perform all activities related to the provision of services; volume requested by the client and capabilities of the contractor to take them on; minimum turnaround time requested by the client and service capabilities of the contractor to fit within the required interval.

Conflicts arising with regards to procedures for the award of activities – the main conflict-arising zones are: whether the service will be based on a monthly service plan and working hours; or it will be based on a forecasted plan of the volume; or on a forecasted plan of the cost which the contractor must work towards; or an accurate monthly plan on the amount of funds which the client must pay either as a minimum or as a maximum for the specified services under the contract.

Conflicts arising with regards to the term of the contract. If the prices of the services are high, the purpose of the client will be the term of the contract to be as short as possible with an option for termination on his part, and the desire of the contractor will be for a maximum term. Conflicts arising from price fixing - the client wants lower



prices for a certain service, and it is the opposite for the other side.

Conflicts regarding the method of payment – the desire of the client is for a delayed payment, and for the contractor it is the opposite. Disputes arise on the ways of payment and when determining price changes on the basis of: currency exchange rates, changes in legislation, leading to an increase in tax payments, changes in the cost of consumables.

Conflicts arising from the negotiation of rights and obligations of the parties. They arise in connection with the access to information provided by one party to another and control over the provision of the service; the right to commission and perform additional services; the right to reserve appropriate equipment necessary for the provision of the service; authorizing third parties regarding the ordering and implementation of service; issuing the necessary documents for proper rendering of the service; compliance with the rules of industrial safety and labor protection; control and compliance with statutory requirements to ensure healthy and safe working conditions; for occurring emergencies, as well as violations of third parties, which obstruct the provision of the service.

Conflicts arising when determining liability for breach of any provision of the contractual obligations. Conflicts arising from pressure by senior managers or structures for entering into a contract despite unfavorable conditions for the company.

2) Conflicts during the performance of the contract concerning the quality of service; the timely implementation of the task; untimely request of a service; conflicts based on internal disagreements in one of the contracting parties (strikes, etc.); force majeure conflicts, requiring urgent provision of service and inability of the contractor to comply.

3) Conflicts within the organization of the outsourcing client with regards to the delivery of services by the outsourcing contractor. These conflicts are caused by inefficient coordination of the work in the provision of service between the internal department and outsourcing contractor on the one hand, and on the other, the individual structural units of the outsourcing company.

An outsourcing conflict is a clash which occurs when the behavior of the outsourcing client or outsourcing contractor blocks the behavior of the outsourcing contractor or outsourcing client regarding an outsourced function or process.

Participation of the outsourcing partner in this conflict is determined by the importance of the set goals to him, and the way the emerging obstacles prevent him from their realization.

Reasons [3]: limited resources; differences in objectives, values, methods of conduct, level of qualification; misallocation of responsibilities; poor communications; failure to fulfill arrangements.

General conflict theory [9] gives answer to the traditional questions of strategy and tactics in solving conflicts. It clearly identifies the stages of the analytical process (revealing the nature of the unmet needs, mutual search of acceptable structures in a relationship, the satisfaction of these needs) and the end result, i.e. the timing of conflict resolution, when mutual satisfaction of the respective needs of the parties is achieved and new relationship of partnership is created.

Disregarding the pre-conflict stage by the subjects of management in most cases leads to late managerial impact, to impossibility for control and regulation. Managerial impact on the conflict process should take into account not only the stage of the conflict's development, but also to contribute to the effective transformation of the conflict. A regulation of the conflict only brings the pre-conflict stage back. It does not solve the conflict, but only postpones the time of its re-occurrence.

The process of conflicting calls for the transformation of cooperation in the aspect of reconciling differences between the parties through finding of a new mutually beneficial interest. The outsourcing conflict as a sort of interagency conflict can be interpreted as a social process of outsourcing, consisting of respective periods and phases of development. Such an examination allows for various management related models to be created [8] in view of correcting the behavior of participants in the outsourcing conflict and a timely intervention of company management, staging of disputes and discussions, if the conflict has a positive direction. This allows for the different stages in which the conflict can be mitigated and adjusted to be specified in order to prevent its deployment.

## CONCLUSION

The development of outsourcing conflicts goes through different stages. Each of them can provoke a change in the behavior of the conflicting parties, which can satisfy the claims and a consensus to be reached, but it may also deepen

the rift. Understanding and reflecting on the characteristics of each outsourcing conflict and the analysis of its specific characteristics is the way to its management and resolution [7]. Finding constructive aspects in pre-conflict situations is a key competence in conflict resolution, which provides heuristic information about arising outsourcing problems and for certain aspects of their resolution.

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## RETROSPECTIVE ANALYSIS OF THE TRANSPORTATION PROBLEM

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### ABSTRACT

*In modern market environment the goal of businesses is to be competitive. Maintaining competitiveness is necessary to realize continuously, periodically develop and include events in the organizational strategy of reducing the cost throughout the supply chain -- production -- realization. Transportation models provide a powerful framework to create this aim.*

*This paper presents a historical review of previously known approaches to the solving of transportation problems. The task is along with the presented approaches to give directions for development of new types of transportation problems and new algorithms for their solution.*

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

### INTRODUCTION

In modern market environment the goal of businesses is to be competitive. Maintaining competitiveness is necessary to realize continuously, periodically develop and include events in the organizational strategy of reducing the cost throughout the supply chain -- production -- realization [4]. Transportation models provide a powerful framework to create this aim. The objective of the transportation model is to determine the amount to be shipped from each source to each destination to maintain the supply and demand requirements at the lowest transportation cost.

### SUMMARY

The transportation problem was formalized by French Mathematician Gaspard Monge in 1781. Tolstoi was one of the first to study the transportation problem mathematically in 1939 [3].

The basic transportation problem was originally developed by Hitchcock in 1941 [30] and after that it is presenting by Koopmans [35] in his historic paper "Optimum Utilization of the Transportation System". Dantzig, in 1951 [22] used simplex method to the transportation problem. The first overall, finished method for solving transportation problem ("method of potentials") Leonid Kantorovich developed in 1949 [1]. In 1954, Charnes and Cooper [17] developed the stepping stone method which

provides an alternative way of determining the simplex method information. Shell in 1955 [54] stated an extension of well-known transportation problem is called a solid transportation problem in which bounds are given on three items, namely, supply, demand and conveyance. In 1962 Haley [29] presented the solution procedure for solving solid transportation problem, which is an extension of the modified distribution method. Kuzovlev in 2012 [2] researched a decomposition algorithm for the solution of the transportation problem with limited restricted admittance abilities.

Many transportation problems arise in unclear circumstances, and their parameters are not clearly defined. Zadeh in 1965 [63] introduced the fuzzy set theory and has applied it successfully in various fields. In 1986 Atanassov proposed the intuitionistic fuzzy set (IFS) [12] which is more reliable than the fuzzy set proposed by Zadeh. The major advantage of intuitionistic fuzzy set over fuzzy set is that IFS separates the degree of membership (belongingness) and the degree of non membership (non belongingness) of an element in the set. The fuzzy set theory is used in the field of optimization. Bellman and Zadeh in 1970 [63] published an article for decision making in fuzzy environment. Atanassov in 1995 [11] presented the ideas for intuitionistic fuzzy equations, inequalities and optimization. He formulated the optimization problems using the apparatus of the IFSs and he studied the importance of considering the concept of IFSs in

optimization problems. Further, he discussed that how to use the apparatus of the IFSs in optimization problems. Angelov in 1997 [8] presented intuitionistic fuzzy optimization for linear programming, in which the non-membership function is considered as the complement of membership function.

Chanas, Kolodziejczyk, Machaj in 1984 [16] presented a fuzzy linear programming model for solving transportation problems with crisp cost coefficient and fuzzy supply and demand values. Patel and Tripathy in 1989 [48] proposed a computationally superior method for a solid transportation problem with mixed constraints. Bit et al. in 1993 [15] presented a fuzzy programming approach to multiobjective solid transportation problem. Basu et al. in 1994 [14] developed an algorithm for finding the optimum solution of a solid fixed charge linear transportation problem. Gen et al. in 1995 [20] gave a genetic algorithmic for solving a bicriteria solid transportation problem with fuzzy numbers. Li et al. in 1997 [39] discussed the genetic algorithm for solving fuzzy multiobjective solid transportation problem with fuzzy numbers. Jimenez and Verdegay in 1996 [27] proposed a solution procedure for uncertain solid transportation problem. Also they developed [28] developed in 1999 a parametric approach for solving fuzzy solid transportation problems by an evolutionary algorithm.

Chanas and Kuchta in 1996 [16] proposed solution of the transportation problem with fuzzy coefficients. Liu and Kao in 2004 and 2006 [41, 42] described a method for solving fuzzy transportation problem on extension principle.

Lin in 2009 [40] introduced a genetic algorithm for solving the transportation problem with fuzzy demands and fuzzy supplies.

Samuel and Venkatachalapathy in 2011 [51] applied Modified Vogel's Approximation method for fuzzy transportation problems. Thus, several researchers have solved solid transportation problems under fuzzy environment.

Dinagar and Palanivel in 2009 [23] investigated the transportation problem in fuzzy environment using trapezoidal fuzzy numbers, Pandian and Natarajan in 2010 [47] proposed a new algorithm for finding a fuzzy optimal solution for fuzzy transportation problem where all the parameters are trapezoidal fuzzy numbers (Zero point method). Mohideen and Kumar in 2010 [44] did a comparative study on transportation problem in fuzzy environment.

Dubey and Mehra in 2011 [25] studied linear programming problem in intuitionistic fuzzy environment using intuitionistic fuzzy number and interval uncertainty in fuzzy numbers. Parvathi and Malathi in 2012 [50] gave an intuitionistic fuzzy linear programming problems which are based on fuzzy decisive set method.

Gani and Abbas in 2014 [18], and Kathirvel, and Balamurugun in 2012 [32, 33] proposed a method for solving transportation problem in which all the parameters except transportation cost are represented by trapezoidal intuitionist fuzzy numbers.

Patil and Chandgude in 2012 [49] performed „Fuzzy Hungarian approach“ for transportation model with trapezoidal arithmetic fuzzy numbers. Hussain and Kumar in 2012 [7] investigated a method for solving transportation problem in which all the parameters except transportation cost are represented by trapezoidal intuitionistic fuzzy numbers. Hussain and Kumar in 2013 [31] proposed an optimal solution of mixed constraints intuitionistic fuzzy transportation problems. Lohgaonkar in 2012 [43] defined fuzzy multi-objective multi-index transportation problem with linear membership function and solved by using fuzzy programming technique. Samuel and Venkatachalapathy [52, 53] proposed a new dual Based approach in 2012 and simple heuristic algorithm in 2013 for the unbalanced Fuzzy Transportation problem by assuming that a transportation cost is fuzzy trapezoidal fuzzy numbers. Jahihussain and Jayaraman in 2013 [26] present a zero point method for obtaining an optimal solution for fuzzy transportation problems with triangular and trapezoidal arithmetic fuzzy numbers. Shanmugasundari and Ganesan in 2013 [56] proposed a fuzzy version of Modified distribution algorithm and approximation method of Vogel to solve fuzzy transportation problem with triangular fuzzy numbers.

Kaur and Kumar in 2012 [34] proposed new methods for finding fuzzy optimal solution of transportation problem in which the transportation costs are represented by generalized trapezoidal fuzzy numbers.

Narayanamoorthy, Saranya and Maheswari in 2013 performed a method for solving Fuzzy transportation problem using „Fuzzy Method of Russel“ [45] and used trapezoidal fuzzy numbers. Shashi Aggarwal and Chavi Gupta in 2013 [6] proposed algorithm for solving intuitionistic fuzzy transportation problem with

generalized trapezoidal intuitionistic fuzzy number via ranking method. Geetharamani and Devi in 2014 [19] submitted model, in which fuzzy transportation problem has been converted into crisp problem by Robust ranking indices. A simple algorithm has been developed to find the optimal solution in transportation problem. The proposed method helps to get directly optimal solution with less iteration.

Antony, Savarimuthu and Pathinathan in 2014 [9] discussed the transportation problem using triangular fuzzy number. They considered triangular fuzzy number as triangular intuitionistic fuzzy number by using format only but they are always triangular fuzzy number.

Dinagar and Thiripurasundari in 2014 [24] have been used intuitionistic trapezoidal fuzzy number for representing different parameters of transportation problems.

Shugani, Abbas and Gupta in 2014 [55] investigates a dual simplex method approach to solve transportation problem with fuzzy demands and fuzzy supplies.

Kumar and Hussain in 2014 [36] presented a systematic approach for solving mixed intuitionistic fuzzy transportation problems. Singh and Yadav in 2014 [57] developed efficient approach for solving type-1 intuitionistic fuzzy transportation problem where the supply, demand are triangular intuitionistic fuzzy sets and the cost is fixed crisp number. Computationally simple and new method called "PSK method" for finding an optimal solution to fully intuitionistic fuzzy real life transportation problems was presented by Kumar and Hussain in 2015 [37]. Singh and Yadav in 2015 [58] developed fuzzy programming approach for solving intuitionistic fuzzy linear fractional programming problem. Kumar and Hussain in 2015 [38] proposed a method for solving unbalanced intuitionistic fuzzy transportation problems. Pandian [46] described Realistic Method for Solving Fully Intuitionistic Fuzzy transportation problems. Srinivas and Ganeshan in 2015 [59] considered Optimal Solution For Fuzzy Transportation Problem Using Stepping-Stone Method.

Gupta et al. in 2016 [21] presented a new method for solving fuzzy linear programming problems based on the fuzzy linear complementary problem.

A new approach to transportation-type problems is based on the Index Matrix concept, which apparatus was introduced in 1987 in [10],

defined in a series of papers and summarized in the book [13], was presented in [5, 60, 61, 62].

The outlined approach to solving the new transportation problems with index matrices has the following advantages:

-- The defined algorithms can be applied to both the transportation problem with crisp parameters and with fuzzy or intuitionistic fuzzy ones;

-- The defined algorithm can be extended in order to obtain the optimal solution for other types of two or more-dimensional transportation problems [61].

## CONCLUSION

The article provides a literary overview of the emergence and ways of solving the classic transportation problem. In the conditions of its variability, new types of two-dimensional and three-dimensional transportation problems are formulated and new algorithms are defined for their solution, taking into account the uncertain parameters.

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## COMPETENCE AS AN ALTERNATIVE TO THE SYSTEM OF ADMINISTRATIVE CONTROL

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### ABSTRACT

*This paper analyses the presence of competence in the control processes in the economic sphere. For this purpose, the work of the social control mechanism is considered as a complex, material expression of the manifestations of the competence factor. Clarifying and specifying the role and place of the factor in the development of the control process predetermines the content of specific tasks involved with the theoretical economic and legal grounds that reveal the essential characteristic of the analyzed concept. In this context, the underlying argumentation is the following: the manifestation and development of the competence factor creates the possibility, in general, of control and, in particular, of administrative control, to achieve high levels of efficiency.*

**Keywords:** control, competence, authority, power, criterion.

### INTRODUCTION

In the socio-economic sphere, deep and decisive transformations have been carried out both at home and globally. These are, in essence, attempts to optimize the operation of socially, economically and politically poor social systems in the last few years. Change and transformation processes are targeted actions to ignore identified deficits and create the conditions for a mechanism for the sustainable development of society, a mechanism called the "market" to function according to the laid expectations and the stated interests.

### EXPOSITION

The establishment of different entities as both private and legal entities creates new meaning and content in the work of the state in regulating the requirements that they must meet at the entrance before entering into market and commercial relations. However, the legislative application of such state requirements to the behavior of the market players is pointless without control over their application and compliance [1]. Analyses on the activity of the executive authority prove that the control issue is caused by the presence of certain key factors such as sometimes the catastrophic, dynamics of the socio-economic processes, the state of the legislation, the role of the state in protecting the

interests declared by citizens and society, enhancing the statehood in addressing a number of recurrences of antisocial phenomena and corrupt practices.

It is almost impossible to challenge the qualities of control as a social phenomenon. The history of the human race is the most significant proof and reason both for his manifestations and for his evolution [2]. Regardless of the organization, the distinct types and the characteristic forms of expression, control is a public attitude, engaged in regulation of behavior, having a controlling influence both on personalities and on personal and social formations, which predetermines the analysis of the control both in theoretical and in a purely practical-applied aspect. It is very delicate to assume whether these are two separate profiles or an official face of the publicly relevant impact under consideration [3]

Practically, the theory and practice with its various events complement and impose the perception of the control function in its entirety. The differences in behavior also provoke differences in the manifestations, and there is no doubt about the contradiction between the characteristics and the laws of public control, its methodology and its relation to social governance.

The theoretical developments and practices prove that exercising the control function is a highly moral power in the real application of

professionalism and perfection in the behavior of individuals and their formations, which also acquires elements of creative activity due to the imposed adhocratic forms of organizational existence and freedom in the choice of behavioral models.

The analysis of control relations as a social phenomenon reveals great diversity in terms of their classification and types. The assignment of certain, considered relationships to a specific type [4] takes place depending on the way of reconciling and exposing the differences of interests and potential of the social objects. The differences in interests present essential characteristics of specific, social organizational structures as well as the specifics of the periods of their development. It is this fact that specifies the varied, predominant purpose of critical relationships to certain aspects of behavior of social subjects and interests that provoke uncertainty. [5]

In response to these critical aspects of behavior, areas with proven need for control are identified. Consumers of power resources motivated by their interests declare the critical boundaries of their behavior in these areas under established rules and norms.

The variations in the potentials of the social actors involved in the organizations have their own historical and actual specifics. The predominant sources of power may be different, establishing a certain range of opportunities for supremacy as dominating. Dominant opportunities for domination, in turn, predetermine the appropriate, most widely used ways of influencing the behavior of others by means of which the rules and norms are respected. Similarly to rules and norms, the means of influence and their compliance in some form are institutionalized [6]. They become a mandatory part of the rules and norms.

The impact on individual behavior, its guiding in a certain direction, depending on certain criteria, norms and rules, is an objectively ongoing process of continuous striving for balanced correspondence between the subject and the object of control. Personalization and individualization do not alter relationships in this process except when the inclusion of behavior into the interests of a particular group is also a matter of deliberately manipulated within certain limits registered by specific interests [7]. From the written so far, it can be concluded that the analysis of the specifics in the different stages of manifestation of ambiguity in the single control

relation creates the conditions for typology of the attitude itself. [8].

Each economic system can be considered as a set of interconnected production processes consisting of separate operations in which certain labor objects are transformed into consumption values. The unity of the processes and their forming operations is organized in a production-technological expedience, a proven necessity and a logical sequence of relations between them [9]. The fact that the economic system is modeled by processes and operations - a specific expression of deliberate human activity, conveyed by relationships of individuals and their formations, defines it as a social organizational structure with a production-functional purpose.

The central problem in the analysis of social organization, regardless of its status and scale, is to what extent its organization and functioning effectively serve irrationally its socio-political or production-functional purpose [10]. In order to solve it it is necessary for the systems management to monitor both the production and technological expedience of the processes and operations involved, as well as their social side, the effective structuring of the social relations, including the relations of control. In this sense, system management should take into account both the production and technological expedience of processes and operations and their social side.

At a certain stage in its development, society creates a governance structure and organization as its internal mechanism of action. Differences in individual socio-economic formations are the result of altered ratios in the way of production and consumption, of contradictions expressed through the form of power and governance. The evolution of man is a result of the building and improvement of a particular structure of the society based on a certain way of objective, necessary, personal participation in a specific degree of the social production. The structure sets the dynamism, the moving part of social development and predetermines its real and potential opportunities for the realization of a certain goal [11].

In the management theory, it is known that the norm is a solution to the parameters in which the system is developed, its purpose and the objectives for each subsystem, each element and process. The control function is manifested not only to determine the performance of the norm but also to assess the quality of the decision [12]. Here, it is worth noting that the norm is not a canon or dogma with a specific limiting

character, but a precise expression of maximum satisfactory values of the decision taken, presenting its significance and potential.

Every norm, reflecting a specific management decision, is related to the reconciliation of a certain range of values of controllable and uncontrollable parameters. The classification of the parameters is implemented on the basis of the objective possibility the subject of the norm to influence them, and it is especially important to note that parameters uncontrollable for the specific norm influence its formulation too. When combining the controllable and uncontrollable parameters, a significant factor is defined for the specific norm, internal and external thresholds, called limitations on possible values of the parameters that characterize both their content and the relations between them.

In the process of forming the management solution, the possible outcomes are analyzed by linking to the values of the resultant parameters and forming several possible outcomes, providing conditions for fixing the selection criteria. The particular choice is related to the possibility of achieving desired values of the resultant parameters. It is necessary to have at least two variants of combinations of the parameters of the controllable parameters, leading to acceptable results for the decision subject [13].

The process of setting a norm for decision-making can be considered in two aspects, depending on the presence of control:

First, the control is about the reality of the chosen norm, its proper structural order of time and space, its adaptability to the system's capabilities, the correspondence with the best achievements in other systems. The assessment of the norm in the system from the positions of established criteria and requirements, of the leading achievements in the world becomes an objective development need, a mandatory condition for influence in control.

Second. The control assesses the presence of quantitative and qualitative dimensions in the norm, the precise characteristics of the controlled parameters. A norm in which time and space are absent, as well as the quantitative and qualitative dimensions, responsibilities and incentives, is beyond control. It deprives the management process of the normal development of rights and feedback, its nature and content. In this context, the purpose of control as a function of management is to ensure the implementation and updating of the assigned target function of the

managed system on the basis of the feedback principle.

Against the backdrop of everything that is said in general about control, it should be added that the process of improvement enhances the presence of the society itself and the role of its leading controlling person in the state. [14] It is precisely on this occasion that the administrative control, which is perceived as a specific form of control, is an immanent prerogative of the supreme state institution.

The analysis of this convergent control form proves that it has a sufficiently long history dating back to the 5<sup>th</sup> century BC. With the codification of Roman law, it is considered that there is reason to speak of the first manifestations of such control [15]. Whether and how exactly the next steps in its evolution are implemented is not so important, the essential point is that the state and the established subject in the face of the executive authority are actively involved in its formation. Conceptually, ideas arise related to: the police state, the bureaucratic organization, neoinstitutionalism and others [16].

By its nature, administrative control reveals that it is a government-managerial activity implemented through the performance of functions assigned to a body influencing the actions of different actors in public life. To complement the feature, it cannot be forgotten that administrative control is an essential part of the executive-ordering activity of government.

Since the state administration itself is a legal, administrative, regulatory, organizational and controlling activity in all spheres of public life, in particular, the administrative control is established as the power of the executive authority.

The interesting and essential part of the analysis of the control exercised by the executive authority is the moment when the third reason related to the manifestation of competence is added to the grounds that are well known by the theory of control - as a critical public attitude and as a management function. The disclosure of the role of the third ground is a real opportunity through the theory of competence to clarify the administrative legal personality of the executive authority, in other words to specify the reason why only the structures of the executive power exercise this kind of control.

In Bulgarian legal literature, it is revealed that "competence means the authority the legislator has given to a particular person or place to make willed statements assigned to the state" [17].

The administrative-legal science, specifically on the issue of competence, emphasizes on two thematic lines of development. One - "quantitative theory" - explains competence as a distinct set. According to the other, competence is an expression of legal personality of the state body. In fact, the process of conferring authority on a particular body is a process of recognizing its ability to be constituted as a legal entity with a certain authority [18].

These understandings in recent years have influenced not only the development of administrative control itself, but also the overall presence and behavior of the state, especially in the processes of economic life. What's leading is that the state restricts its intervention in the development of business initiatives by the various actors. Its role is limited only to the administrative regulation in entering into legal relations on the basis of economic activity. Observing its interests, the state regulates the regulatory requirements that must be met by those wishing to enter the market [19].

The review of the legislative changes made over the last 10-15 years reveals that the supervisory competence of the authorities by the Bulgarian executive authority can be justified either as a manifestation of competence by level or separately and independently on the basis of a specific law. It is precisely the above-mentioned finding that the representatives of the scientific circles, mainly lawyers, consider that on the occasion of the administrative control, the well-known "classical" definitions of control should be used extremely carefully and precisely. The main recommendation for such actions is to emphasize the presence of "control competence" and the development of its essence and role [20].

### CONCLUSION

The analyses and facts of the report allow us to conclude that competence, interpreted as a set of powers, is becoming a key factor in the development of control exercised by the state. Along with other established control sources or grounds, competence creates conditions in the implementation of control by the executive authority to eliminate certain established weaknesses and registered deficiencies.

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## SEVERAL UNRESOLVED ISSUES FROM THE BULGARIAN CONTROL AND ADMINISTRATIVE PRACTICE

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### ABSTRACT

*This article addresses the processes in the state related to regulation, organization and control, which essentially form the object of administrative control. The purpose of this analysis is to reveal the growing problems and their sources. As the executive authority is distinguished among them, the local self-government, the prosecutor's office, and the justice system have a specific character because each designated source acquires the features of an object in the control systems appropriately separated from the state. The idea of the expose is to present another point of view, revealing some features of the objects in question, so that the system of general and administrative control can look for solutions to the weaknesses identified in the functioning of the specific systems in particular and, more generally, in its work by extending the scope of powers delegated by it or exercised by itself.*

**Keywords:** *state, control, power, justice, prosecution.*

### INTRODUCTION

The theoretical elucidation of any problem occurred is related to analysis, identification of alternatives and solution finding. But when the problems become more and the analysis of the causes and the search for principle solutions is multidirectional, the whole process becomes complicated and multi-layered and unfortunately does not always generate the expected results. All this supports the understanding of philosophers, consultants, and critics that progress has a complex and contradictory nature, cause, and functional meaning. [1]

Whether as J. Schumpeter defines the main trend, revealed in the analysis of the present article as creative destruction is not so essential, the main and leading point is that progress in modern society is based on the conduct of scientific, technological, information-communication and socio-economic changes. This trend has become a major factor in rethinking social experience and established traditions [2]. This is the reason to find that experience and traditions acquire a new, different meaning. This confirms the view that reality adheres to an established canonical form, at the same time revealing the dynamics of its perfection [3].

### EXPOSITION

Under these conditions and circumstances, the society as well as its specific elements or entities are subject to change. In the process of communication and interest, the patterns of behaviour used are becoming more and more unpredictable and diverse [4]. It is for this reason that the challenges to all manifestations of control at all levels of society and among all social strata are becoming more and more difficult and delicate.

Although control over recent years has been growing steadily, and in terms of its theoretical development and its formal institutional improvement, the expectations and needs of the society towards and from it are becoming more and more important [5]. In this context, the place and role of the state as a leading controlling entity and a supreme institutionalizing and institutionally represented organization are becoming even more serious. However, in order to reveal a small part of the problems of the administrative control, several clarifications should be made, arising from the retrospective and comparative legal analysis of control:

First. In its long history, control proves that it is differentiated on the basis of a critical public attitude towards the person's behaviour or an organized, personal formation that has arisen in the creation of goods.

Second. In the process of its improvement, management asserts the place of control as a compulsory last step in its structure. It is precisely that control as a corrective mechanism, comparing a fixed norm with registered results purposefully, makes the necessary changes.

Third. Different circumstances and situations provoke the emergence of a number of formal manifestations of control wherein different control systems different level control subjects are established. In them, the exercise of control is predetermined by the access to power resources on the basis of which the delegated control-managerial powers are properly and lawfully exercised.

Fourth. The presence of the state in the implementation of the control and governance processes guarantees presence of statehood, institutionalization and application of law. These are factors that imply the purpose differentiation of the different types of power - legislative, judicial and executive.

Fifth. In accordance with its place and role in the development of society and its social hierarchy, the different types of organizational structures, according to their essential characteristic and nature of work, exercise different types of control influence, revealing features both of control and supervision. In this context, although the sovereign is one, there is an opinion that control predominantly is an important power of the executive authority, and supervision according to the same logic - of the judiciary. [6] Another position opposes this claim by justifying the existence of a huge power resource allocated to the executive. Maybe in principle, the solution that the society expects is not how it will be called the applied corrective mechanism, but what results it generates, how it justifies the expectations and protects its interests.

The briefly discussed views on the development of the control idea create the conditions to address some specifics in the work of the important controlling entities and to reveal a small part of the concomitant problems. The critical review of the institutions is deliberately presented in a downward direction with the aim, after analysing the inherent problems in their work, to seek a connection between them in terms of interinstitutional communication.

The highest-ranking entity exercising control in the Bulgarian state is the National Assembly. On the basis of the current Constitution and Rules of Organization of the activity of the

National Assembly, the National Assembly, together with its legislative function, exercises its control function [7] [8]. It is essential to know that the exercise of parliamentary control has significant legal implications. The main object of its work is the lawfulness and correctness of the actions of the administration. Disadvantages or problems in the work of the National Assembly in the course of control are developed in a content, formal and administrative aspect.

In principle and content, the first weakness is the measures of effect on the acts and on persons acting as central bodies of the executive authority. In the influence measures taken against individuals, the control efficiency is higher because, based on a vote of no confidence or resignation, individuals can be removed from the central executive authority. On the question of the acts of the central executive authority, the decision is complicated and difficult because, as in accordance with the law on normative acts, an act is subject to annulment only by the same act [9].

Formally, parliamentary control has a variety of forms, such as: transformation, establishing and closure of ministries, no confidence vote (trust), resignations, etc. Here the problem does not arise from the implementation of the specific, formal event, but from the possible consequences and their relation with the balance between the various politically coloured interests.

Regarding the administrative basic principle set out in the Rules of the National Assembly, the possible control, although it is a permanent presumption, can only be implemented on Friday (the day of parliamentary control). By adding procedures, deadlines and other conditions set out in the same rules on the one hand, and on the other, the need to prepare the interviewed persons becomes difficult. By delaying the time to find an answer and a decision, it is in fact proven that control and its presence are meaningless due to the impossibility of introducing corrections or changes in registered socially significant deviations [10]. And interpretations of the facts may be divergent, but always in such situations, any loss of time produces a deleterious effect [11].

At a lower level in the social and governance hierarchy, local government authorities are subject to control. The relationship between them and the state authority is implemented by the district governor. [12] Its powers are to suspend unlawful acts of municipal councils or to repeal illegal acts of mayors of municipalities. [13]

Although control in local self-government is regulated to run on two levels – between the bodies of the local self-government and by the district governor, problems still exist.[14]

In social and business society, it is believed that the control deficit can be interpreted as a result of the dynamically changing socio-political risk. In other words, the partial "disempowerment" of the district administration is compensated by the increase in the influence of certain persons leading specific "attractive" municipalities. In addition, taking into account the conceptually and politically diverse municipal councils and the difficult achievement of consensual solutions, then interaction becomes an unrealistic goal, and the possibility of a constructive dialogue that embraces the constructive critique - the chimera.

A significant and important participant in the process of development of the control over the work of the executive authority is also the Bulgarian Public Prosecutor's Office. Among the powers of authority assigned to it in the central position is the supervision of the observance of lawfulness in the acts and actions of the bodies of the executive authority [15]. An expression of the authority powers of the prosecution in the exercise of supervision is the filing of a protest. This procedural act is invoked when the breach in government is the result of an unlawful act.

Although the activity of the prosecutor's office is related to the exercise of supervision in many spheres of public life, and it being a higher state institution it can self-summon itself, some authors argue that certain undefined regulative positions pose problems [16]. Specifically, as such, it may be pointed out that although the prosecution is, in essence, entitled to make suggestions to all public administration bodies regarding violations, illegal actions and their causes, the initiative is not provided for and regulated in the normative framework. This statutory omission at this stage creates an insurmountable barrier to the participation of the prosecution in building real prevention.

The last subject, placed in the focus of attention of the expose, is the Bulgarian court, which only implements justice on the territory of the state. An insignificant part of the work of the judiciary system is related to challenging administrative acts. The connection between the work of the administrative and control system and the judicial system is the opportunity to examine from a different angle the presence of legality in acts and actions of the state

administrative apparatus. A number of specialists believe that the so-called "judicial" control over acts and actions of the administration is not effective enough [17]. The results are improved with the active involvement of internal administrative controls [18].

## CONCLUSION

The problems that accompany the work of judicial control derive from some of its peculiarities:

First. It only affects the legal aspect of administrative activity, although the deficiency of legality always causes damage and losses [19]

Second. It begins to function once the illegal action has ended, i.e. when there is a detrimental effect.

Third. The court is deprived of initiative, that is, it does not have the opportunity to self-summon.

The content of the report provides evidence to conclude that the problems that accompany the Bulgarian administrative control have a very diverse and serious nature. Finding solutions to them is a challenge facing academics and lawmakers. However, the possibility of ignoring the impact of these problems should not be postponed in time and thus to cause further damage, but should be thought of as a set of problems of the whole society. If the statesmen begin to think as owners, governors - as managers and the rulers - as part of society itself, maybe there will be found the will to change and to find solutions in both the specific spheres and in the entire society as well.

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## THE PERSONNEL CRISIS IN THE BULGARIAN TOURISM SECTOR: CAUSES AND EFFECTS

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### ABSTRACT

*Tourism is an activity directed towards people, towards satisfying their needs and wishes, it is a sensor to assess human senses, ambitions and aspirations, a barometer of the tendencies in the behavior of a person outside their familiar environment, a springboard to knowledge and an opportunity for self-assessment and continual development.*

*With the end of each tourist season the problem in Bulgaria with staff fluctuation, lack of qualification and the inability to make tourism staff stay on keeps getting worse and worse. For this reason, the factors for the worsening crisis were studied by means of a survey. From June to September 2016 employers and managers in the tourism sector were given the survey questions in a written form. It encompassed 19 randomly chosen hotel complexes on the Bulgarian Black Sea coast.*

*The research had the following goals:*

- *To determine the factors contributing to the deepening staff crisis in the tourism sector;*
- *To determine the degree of trust in the preparedness of specialists who have graduated in tourism specialties.*

*For a more in-depth analysis, certain sub-tasks were set as follows:*

- *To determine the specific demands of employers for specialists with a diploma in the field of tourism;*
- *To determine the level of quality of the specialists with a diploma in tourism;*
- *To determine recommendations and suggestions for improving the quality of the specialists with a diploma in tourism.*

**Key words:** *tourism staff, crisis, survey, competitiveness.*

### INTRODUCTION

We are currently living in a dynamic system characterized by intensive changes: political, economic, social, cultural, educational, ethnic, etc. Viewed globally and locally, all these changes create prerequisites for continuous development of communications. And communications are the “substrate” that synthesizes a new and different socio-economic environment, ethics and culture of relationships. In the context outlined above, tourism plays an unquestionably important role, not just because it is a factor for the development of the world’s economy, culture, education, healthcare and other areas.

The challenges that the development of Bulgarian tourism faces are in the center of the “Strategy for sustainable development of tourism

in Bulgaria 2014-2030”, prepared by our Ministry of Tourism. [6]

According to this document, the present-day international tourist industry functions in a complex political and economic environment, and in a growing competition. Information from the World Tourism Organization (UNWTO) shows that, regardless of some critical events (wars, terrorism, natural disasters), international touristic travels and income from tourism have a positive increase every year.

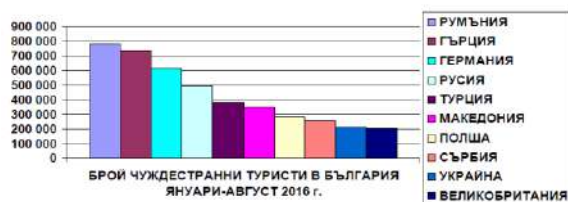
The “Strategy for sustainable development of tourism in Bulgaria 2014-2030. 2030 Horizon” has designed a set of long-term strategies in the spheres of planning, investment, domestic tourism, research, provision of services, improvement of infrastructure and transport, professional training and qualification of the

workforce in tourism, diversification of the touristic product, restoring and maintenance of existing tourist areas, and improving the general image of the destination.

To quote UNWTO, tourism industry is the key for progress, prosperity and well-being worldwide [7].

In parallel, Bulgarian tourism industry also shows dynamics and positive tendencies in its development. Official data from the Ministry of Tourism [8] reports a 15.7% increase in the number of international tourists who have visited Bulgaria from January 2016 to August 2016 compared to the same period in 2015.

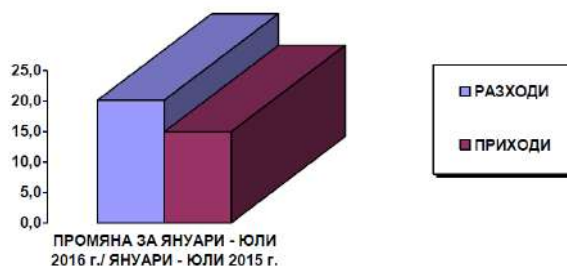
From January 2016 to August 2016 a total of 6 054 539 foreign citizen visited Bulgaria, not counting transit passengers. Their number is higher by 15.7 % compared to the same period in 2015 (See Figure 1 below). An increase is observed in the visits for holiday and vacation, where the number of visits is 3 950126 and a growth of 20.5%, and for those coming to visit relatives and friends the number is 479 878 with a growth of 26.7%. Business visits are 909 622, and went up by 14.8%.



**Figure 1.** Number of foreign tourists who were on a visit to Bulgaria from January to August 2016. Main emissive markets – Romania, Greece, Germany, Russia, Turkey, Macedonia, Poland, Serbia, Ukraine, Great Britain. (source: Ministry of tourism bulletin - [8]).

For the period of January 2016 to August 2016 EU countries were still the largest generating market for Bulgaria’s international tourism, with a relative share of 60.7%, a total number of 3 674 671 tourists and an increase of 19.2%.

Income from international tourism into the current balance account is, as reported by the Bulgarian National Bank for the period of January to July 2016, € 1 747 800, a 15% increase compared to the same period in 2015. Expenses made by Bulgarian citizens for travel abroad for the same period are a total of € 6 888 400 – a 20.2% rise compared to the 2015 figures (Figure 2).



**Figure 2.** Income from tourism in Bulgaria; Expenses / Income January – July 2016 change compared to January – July 2015 (source: Ministry of tourism bulletin [8])

Taking into consideration the registered rates of growth in Bulgaria in the recent years – higher than the average for our sub-region – and corresponding to the UNWTO prognoses about the development of tourism in the sub-region of Central and East Europe, it could be expected that Bulgaria will have an average annual increase of incoming tourism that is higher than the average for our sub-region: namely, about 4% by the year 2020 and about 3% from 2012 to 2020. In accordance with the above forecasts and under equal other terms, it might be expected that in 2020 Bulgaria will attract more than 9 million international visitors (again excluding transit passengers) – a growth of 37% for the 2012-2020 period), and in 2030 the number of people visiting our country for tourism will exceed 12 million.

## PRESENTATION

Today’s tourism is a challenge. With the environment in which it currently develops – a complicated business and social situation, migration that is hard to control, unfair competition, strife for markets and constantly changing needs, desires and demands of the tourists – the issue of human resources in Bulgarian tourist industry is markedly on the agenda and is permanently being debated. [2]

Competitiveness [3] of tourist destinations is a criterion for the potential of each country to achieve high productivity by means of an innovative approach to human resources, financial capital and material assets. Being more competitive means a higher economic growth and an ability to deal with competition pressure. It is a complex economic category determined by

lots of factors: economic growth, macroeconomic stability, openness of the economy, effective management, good legal framework, reliable institutions and so on. All these factors influence economic competitiveness to a smaller or larger degree. Being adaptive and innovative are the decisive factors. While adaptivity means how the economic entity reacts to the external environment, innovations lie at the basis of this reaction. These are decisions meant to restructure the economic activity on the basis of learning and implementation of new elements. Such properties do not exist in isolation, but are closely dependent on the rest of the company elements. There can be no adaptivity unless the facilities and technological equipment are flexible. The range of tourist services offered and the ability to differentiate and model to meet the tourist's individual requirements define the extent of adaptivity and flexibility of the technical and technological resources.

In their turn the innovations directly related to competitiveness are determined by the technical and social innovations. In tourism technical innovations mean mainly the updating of the material and technical base, investments in equipment, implementation of novel technological, information or communication solutions. At the current stage of development survival, let alone gaining a competitive advantage, of the tourist enterprise depends above all on using technological innovations. Social innovations are related to the set of adopted social technologies. In reality this concerns the issues of staff management, control of changes, building up a company culture and values that account for the success of the technological innovations.

The provision of high-quality services depends on the level of qualification of the manpower, which is the main factor for achieving visitor satisfaction and image of the destination. The quality of the Bulgarian tourist product is going to determine the future of tourism, its structure and the income from it.

The quality and competitiveness of the tourist product together with all their dimensions are above all the result of the availability and competence of the human factor – operational and managerial level staff in the tourist industry.

This is exactly the reason why the in-depth study and understanding of personnel is the key to all strategies for future development and

flourishing of tourism and the hospitality industry.

The tourist industry is characterized by the fact that the human factor is an essential component of the touristic product. It is an inseparable part of the production process, which makes it a factor for guaranteeing a product of quality and variety. To a large extent the human factor determines the total impression from the tourist product, destination, or resort.

The altered understanding of human resources being reduced mainly to the category of “object” of relationships and influences in management suggests looking for influences that would reflect the following interdependencies and peculiarities in a more firm, direct and definitive way:

- The mutual enrichment between the institution and the workforce;
- The correspondence between the declared personal potential and the requirements for public reproduction (offered profession, position, post, role played or status gained)
- Real equivalents of work done in the form of money paid;
- Two-way process of long-term investment.

It is in this considerable amount of organizational, managerial and personal efforts that the conditions for forming and growth of the human capital are created [5].

In our time concepts like vision, intuition and creativeness, leadership and qualification are becoming more and more important. By means of its goals and policies the management of human resources should be able to react to those changes in values by changing the concept of the role of the human factor and how it needs to be managed within the company's global development. As it is getting more and more difficult to predict the dynamic changes in the environment, the processes of adapting and preparing for the changes must further evolve.

Those working in the sector of tourism need two types of identification: to identify themselves with the organization they work for, on the one hand, and with tourism as a field of social activity, on the other. The quality of human resources directly influences the competitive power of the economic entity, and is one of the most important factors for gaining competitive advantages.

Compared to other economic branches, in tourism the human factor determines the main characteristics of the touristic product. This is why lagging behind with the training of the

future specialists and managers negatively affects not only its quality, but also its competitive power. Competitiveness is a socially oriented system of competences, abilities and qualities of the individual, and this system characterizes one's potential to be successful in training, in activities related and unrelated to the profession, adequately determines the personal conduct in the dynamically changing setting, guarantees self-confidence and brings interactions and relationships into harmony with the surrounding world.

Competitiveness in the tourist business depends very much on the various specialists, on their knowledge and skills, working habits and professional conduct. Presently for the branch, workers' professional qualification, successful fulfilment and career advancement are especially pressing issues. Top managers in the tourist business report a serious shortage of specialists and managers with profiled training in a situation of economic crisis and modernization of education [4].

The sector needs an influx of young and competitive staff that would provide high quality professional service meeting the European standards for the branch and satisfying the present-day requirements of society and of users of tourist services, in particular. This unquestionable fact some serious questions and tasks presents to the educational system for professional training. The current needs of the economy must be satisfied, and what also must be taken into account is the continuing fluctuation of service personnel and its dynamic integration into the economic field.

#### **STUDY OF THE FACTORS CAUSING THE CRISIS WITH WORKFORCE IN THE SECTOR OF TOURISM [1]**

With the end of each tourist season the issue of staff fluctuation, insufficient qualification and lack of means to keep them in tourism is getting worse and worse. Hence the present study set out to research the factors leading to the deepening crisis by means of a written survey given to the employers and managers in tourism. The questionnaire was distributed from June to September 2016. It encompassed 19 randomly chosen hotel complexes on the Bulgarian Black Sea coast.

The research had the following goals:

- To determine the factors contributing to the deepening staff crisis in the tourism sector;

- To determine the degree of trust in the preparedness of specialists who have graduated in tourism specialties;

For a more in-depth analysis, certain sub-tasks were set as follows:

- To determine the specific demands of employers for specialists with a diploma in the field of tourism ;

- To determine the level of quality of the specialists with a diploma in tourism;

- To determine recommendations and suggestions for improving the quality of the specialists with a diploma in tourism.

The questionnaire is structured in two blocks: Block A contains the demographic questions, and Block B asks about the parameters of the users' requirements for graduates in tourism.

The questions covered in the blocks are as follows:

- Factors influencing staff selection /their theoretical preparedness/;

- Factors influencing staff selection /their practical preparedness/;

- Evaluation of their command of foreign languages;

- Attitude to the state policy in the sector;

- Attitude to pay in the sector /15 typical positions for the sector are reviewed/;

- Required extra qualifications and key competences;

- Channels for bringing staff to the enterprises.

The demographic review has six questions to determine the profile of the survey respondents. From the analysis of Question One it becomes clear that from the top-level managerial staff interviewed 63.16% are women, while men are nearly 37%.

The second question asks about respondents' age group. As can be seen, the biggest number are managers from 42 to 50 years of age, namely 36.8%. Second comes the age group of the youngest, between 26 and 33, with a percentage of 26.3%. Third are the oldest respondents, from 51 to 60, who are 21% in the survey. The smallest percentage of those interviewed is the 34 to 41 age group: 15.8%.

Respondents' length of service is an important factor to prove that they have in-depth knowledge of the tourist industry and that they understand its need for specialists. What should be noted is that the biggest group of respondents /36.8%/ are those having over 20 years of professional experience in the field of tourism. Second are managers with 5 to 10 years of

service, and third are the respondents with 10 to 20 years in service. Last with only 5.2% are those with experience of 1 to 5 years. On the grounds of these data we can presume that the respondents have in-depth knowledge of the sector characteristics and the typical tendencies of its development.

Nearly half (47.4%) of those interviewed have stated to be at the highest hierarchical level of management in the enterprise that they represent. Second with 42.1% come those at mid-level positions. Only 10% of the respondents have answered that they work in a different position. The replies to this question further confirm that those interviewed are well familiar with the situation in the sector. As high-level managers, they enjoy a panoramic view of the whole picture, and of the processes and tendencies in the tourism sector. Long years in service combined with top command positions guarantee the respondents' expert opinion. So in this aspect it can be concluded that the current analysis is based on expert professional

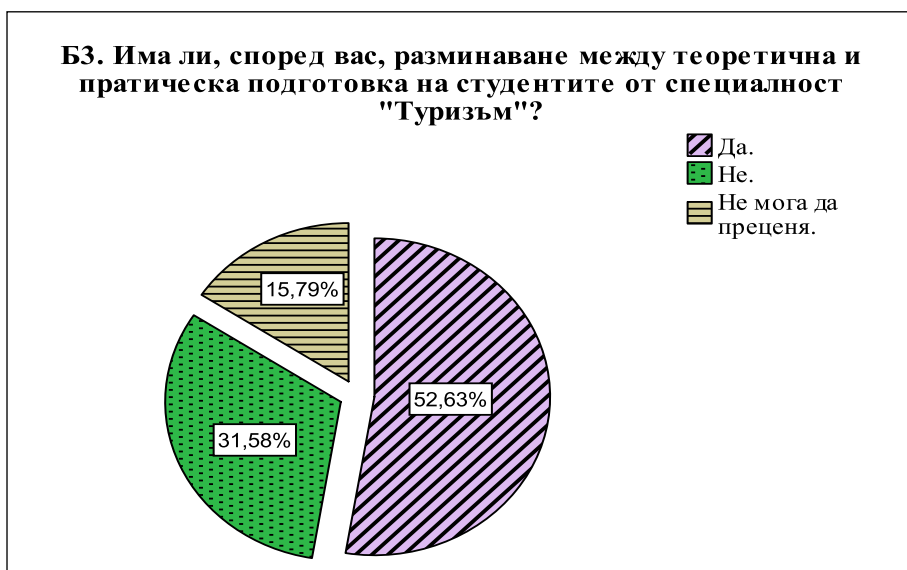
opinions, structured and directed towards uncovering the key factors that have triggered and are responsible for the crisis in the sector.

The summary of the replies about how many people work in the enterprises that the respondents are in charge of shows that the biggest share of 73.6 % belongs to hotel complexes where a staff of up to 50 people are employed. Second with 21.1% are the respondents in whose institutions between 51 and 100 people are employed. Last, with 5.26%, are the managers representing enterprises with a personnel of over 150.

Graph 1 illustrates the respondents' view of "the disparity between practical and theoretical training" of tourism staff.

The results unquestionably show that the majority of those interviewed tend to think that the specialists employed in the institutions that they are managers of display some divergence between their practical and theoretical training.

<b>B3. Do you think there is a gap between the theoretical and practical training of the students studying "Tourism" at university?</b>					
Valid		Frequency	Percent	Valid Percent	Cumulative Percent
	YES.	10	52,6	52,6	52,6
	NO	6	31,6	31,6	84,2
	Can't say	3	15,8	15,8	100,0
	Total	19	100,0	100,0	



**Graph 1** Question B3. Do you think there is a gap between the theoretical and practical training of the students studying "Tourism" at university?  
1)Yes /2) No / 3) Can't say

Graph 1 presents the employers' evaluation of the theoretical and practical preparation of university students of Tourism. What must be pointed out is that over half of those interviewed (52.63%) are convinced that there exists a considerable disparity between the two major types of training of the students. Nearly one-third reply that they have not noticed any such gap, while the remaining 17.9% of the respondents are unable to decide.

Graph 2 shows the responses to Question B13: what in their opinion leads to the chronic shortage of personnel in tourism. The main

choice, with 36.8%, is “the seasonal nature of the work”. A slightly smaller share, namely 31.6%, goes to respondents thinking that the lack of staff is mainly due to “too high expectations about remuneration”. Ranked third is the factor “unwillingness to work in the sector of tourism”, supported by 21.1%. The fourth choice of the respondents is “lack of bonuses for those employed for the first time (season)” – with 15.8%. Interestingly, not even one person has pointed out “unjustified expectations about working conditions” as a contributing factor to the shortage of staff in tourism.



**Graph 2** Question B13: What in your opinion leads to the chronic shortage of staff in the field of tourism ?

1)Other /2) Lack of bonuses for those employed for the first time /3) Desire for rapid career growth /4)Unjustified expectations about working conditions / 5)Seasonal nature of the work / 6)Too high expectations about remuneration / 7)Unwillingness to work in tourism

### OVERALL ANALYSIS

Half the participants in the present survey are top managers in tourist establishments. Their positions enable them to have a full view of what is happening in both the internal and external environment, along with a complete and full knowledge of the picture in the sector of tourism. Over 90% of the employers interviewed have been working in the field of tourism for between 5 and 20 or more years. The profile of the

respondents is also complete with the data about their degree of education. As can be seen, University graduates have a share of nearly 70%. More than 90% of the respondents represent hotel complexes employing staff of between 50 and 150 people. The combination of long years of experience in the profession and corresponding education, along with the experience of finding and selecting staff confirms that the subjects have deep knowledge of the processes going on at the labour market

and of the existing problems and tendencies related to the critical condition in the branch. The respondents' demographic profile supports the thesis that their viewpoint as highly educated professionals with many years of experience is a prerequisite for successfully solving the research tasks set here and fulfilling the goals set.

To sum up the findings from Block B of the questionnaire the following can be stated. The largest part of the respondents (over 60%) are convinced that the specialists with university degree possess good theoretical knowledge. However, they also say that their training is largely short of knowledge that is concrete and specific for the sphere of tourism.

A little over 50% of the employers evaluate the practical preparedness of university graduates as good. The rest, however, support the opposite view. The majority of employers agree that the specialists with a university diploma have unsatisfactory command of foreign languages. Another factor determining the quality of the young specialists is the insufficient number of hours for practical internship – and this is again supported by a little over 60% of all interviewed. To support this argument employers are unanimous about the need to have compulsory internships while students are at university. Again, a considerable agreement is seen about employers' expectations of the practical training of students. Nearly 90% of the respondents wish to employ students with very good practical training in more than one speciality along with acquired professional experience, computer skills and command of two foreign languages.

The view shared by the majority can also be summarized in a similar way about supporting compulsory work (with regulations by the state) in the area of tourism after graduating university in this professional sector. Likewise, employers expect businesses and universities to sign long-term mutual contracts.

The respondents share a predominant view concerning the scale of salaries for positions like waiter, bartender, chef de salle, receptionist, front office manager, housekeeping manager, kitchen worker, manager, cook and chef. It can be seen that the majority of those interviewed have given the same answer (most often over 70%), which demonstrates good knowledge of the labour market and of the respective position. The similar view of the employers is understandable as commonly accepted thresholds for the respective post have been "introduced". The fluctuations observed are usually within a

maximum of plus or minus 10% for the respective job. Only for the receptionist's job the respondents' opinions are grouped in two replies: that the pay should be between 601 and 800 Bulgarian leva (roughly equal to € 300 and € 400, respectively) and 801 to 1000 leva (= € 400 to € 500). Those interviewed give a somewhat different answer concerning jobs like entertainer, team leader, tour guide, host manager, food and beverages manager, or representative. For these jobs the respondents' answers again form relatively equal shares, however the pay suggested is at all three levels. This indicates problems providing workforce of that category. Obviously, the top levels of remuneration would not be offered by the employers if there were plenty of those specialists on the labour market. Characteristic for these positions is the need for specific skills, which actually makes them harder to find and therefore more highly paid. Another factor probably accounting for the differences of opinion among employers is the size of the tourist enterprise, and this is understandable because the load for a working day varies.

The majority of employers believe that the current critical condition in the sector is caused by the seasonal nature of the job and the unrealistically high expectations of payment by the staff.

It is a common practice among the majority of employers to appoint personnel based on talks with friends and acquaintances, as well as from the Internet. It must be underlined that universities do not actively establish contacts between students and businesses so that students can find a job, at least in the opinion of most employers interviewed.

To sum all up, the research tasks set have been fulfilled. The analysis has highlighted the major factors by carrying out the tasks according to plan.

Bulgarian business expects university graduates in Tourism to have command of two foreign languages, to be practically prepared and with real experience in the job in addition to thorough theoretical knowledge in various directions and specific areas.

What can be pointed out as the major consequences from the staff shortage in tourism is the unsatisfactory quality and pricing of the tourist product offered, the low pay levels in the branch leading in turn to dissatisfied workers, disappointed tourists and a general inability to attract the wealthy contingent.

## CONCLUSION

The ever growing demands of the tourists for the services on offer, on the one hand, and the fierce competition between tourism enterprises to attract tourists, on the other, lead to increased role and importance of personnel in the battle for competitive advantages.

In the long run, each economy pays dearly for the lack of quantity and primarily of quality of the educated workforce. It is so because the years spent at school or university form not just knowledge and skills but also habits, understanding, points of view of the workforce-to-be. And the knowledge and skills turn into determiners of competitiveness. Their accumulation as an exceptional resource of the economy gives the educational system a central role in generating prosperity for the society. The knowledge and skills acquired and best practices learned embodied into novel technologies and technological advantages ensure the so much desired market leadership.

Attracting and keeping key members of staff, especially the best among them, has always been an enormous challenge in any field. Gone are the past times when to keep the best workers it was enough to pay them more, give them bigger offices and pompous titles. Now it is no longer as simple as that, and tourism enterprises aware of it have to reconsider lots of their basic practices so that they are able to compete for talented personnel. As a consequence of the migration of specialists, a shortage of qualified workforce appears. And it is the people rather than research or access to capital, technology or marketing that are the main source of competitiveness in any given sphere. Engaging the most talented and making them loyal to the company is the number one priority for all business areas.

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## THE ROLE AND IMPORTANCE OF THE SCIENTIFIC-RESEARCH AND TECHNOLOGICAL PARK FOR THE INNOVATION DEVELOPMENT OF THE MUNICIPALITY OF BURGAS

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### ABSTRACT

*The scientific-research and technological park (also called a “university research park”, or a “science and technology park”) is a strategically planned, purpose-built work environment. It is designed to locate in close physical proximity university, government and private research bodies involved in a particular field of endeavour. The reason is that knowledge can be spread and the research results become significant, innovation promoted and research outcomes progressed to viable commercial products.*

*Burgas is an important industrial centre in this country. The construction of scientific and technology parks on the territory of Burgas municipality aims at attracting new investors to the city as well as strengthening long-term business partnerships.*

**Key words:** *scientific-research and technological park, innovation, investments, regional development.*

### INTRODUCTION

Science-research parks are elements of the infrastructure of the global “knowledge economy”. They provide locations that foster innovation and the development and commercialisation of technology and they are where governments, universities and private companies may collaborate. There, developers work in fields such as information technology, medical science, pharmaceuticals, science and engineering. There is a lot of evidence worldwide that with the growth of the information sector in modern economy, many processes of economic life have changed greatly [6].

### EXPOSE

#### 1. Most common features of the scientific-research and technological parks.

The term “information economics” is considered to be introduced by M. Porat, a researcher at Stanford University, in 1976. However, originally he did not mean the area of economic thought, but a set of sectors (branches) which produce databases and the elements providing databases management. Thus, this term initially had applied designation. It was not connected with fundamental knowledge or a scientific school, but nowadays it is proven that

it is mostly connected with the establishment of regional scientific-research and technological parks. There is a lot of contemporary evidence about the importance and the vital role that such parks have played for the regional development and especially for the “information economics”. [5] Science-research parks may also offer a number of shared resources, such as incubators, programs and collaboration activities, uninterruptible power supply, telecommunication hubs, reception and security, management offices, bank offices, convention centers, parking, and internal transportation.

Science-research parks also aim to bring together people who assist the developers of technology to bring their work to commercial fruition, for example, experts in intellectual property law. They can be attractive to university students who may establish contacts with prospective employers and encourage students to remain in the local area.

Science-research parks may be designed to enhance the quality of life of workers. For example they might be built to include sports facilities, restaurants, crèches or pleasant outdoor areas. Apart from for tenants, science parks create jobs for the local community [1].

Science-research parks differ from high-technology business districts in that they are more organized, planned, and managed. They

differ from science centres in that they lead to commercialized products from research. They differ from industrial parks which focus on manufacturing and from business parks which focus on administration.

Science-research parks are found worldwide. They are most common in developed countries. It defines “university research and science parks” as “property-based ventures with certain characteristics, including master planned property and buildings designed primarily for private/public research and development facilities, high technology and science based companies and support services; contractual, formal or operational relationships with one or more science or research institutions of higher education; roles in promoting the university's research and development through industry partnerships, assisting in the growth of new ventures and promoting economic development; roles in aiding the transfer of technology and business skills between university and industry teams and roles in promoting technology-led economic development for the community or region” [2] [3].

The International Association of Science Parks (IASP) explains that the purpose of these parks is to “promote the economic development and competitiveness of cities and regions by creating new business, adding value to companies, and creating new knowledge-based jobs” [4].

The Cabral-Dahab Science Park Management Paradigm was first presented by Regis Cabral in ten points in 1990. According to this management paradigm, a science-research park must: “have access to qualified research and development personnel in the areas of knowledge in which the park has its identity; be able to market its high valued products and services; have the capability to provide marketing expertise and managerial skills to firms, particularly Small and Medium-sized Enterprises, lacking such a resource; be inserted in a society that allows for the protection of product or process secrets, via patents, security or any other means; be able to select or reject which firms enter the park”.

A science-research park should: “have a clear identity, quite often expressed symbolically, as the park's name choice, its logo or the management discourse; have a management with established or recognized expertise in financial matters, and which has presented long-term economic development plans; have the backing

of powerful, dynamic and stable economic actors, such as a funding agency, political institution or local university; include in its management an active person of vision, with the power of decision and with the high and visible profile, who is perceived by relevant actors in society as embodying the interface between academia and industry, long-term plans and good management; and include a prominent percentage of consultancy firms, as well as technical service firms, including laboratories and quality control firms”.

## **2. The conceptual framework of the important and significant role which the scientific-research park will play for the regional development of the Municipality of Burgas.**

The Municipality of Burgas is situated in South-Eastern Bulgaria on the Black Sea coast and has a territory of about 48,200 hectare. Its administrative center, the city of Burgas, is the fourth largest city in Bulgaria. The municipality includes the City of Burgas and 14 other small villages.

It is the sea that shapes the appearance of Burgas, the spirit of its people and the original atmosphere. Due to century-old contacts with various nations and civilizations, Burgas has always been open to the world and the world's economy and culture by means of its harbour, where more than 1,500 vessels and a large number of petroleum tankers moor each year. The Port of Bourgas is the biggest seaport in the country. The region boasts the best developed industry in Bulgaria: an oil refinery, machine building, cables production, ship yards, food industry, a harbour – a total of 35 big industrial plants. One of the biggest industrial plants on the Balkan Peninsula, Neftochim-EAD, is located in the vicinity of the city. A Duty Free Zone was established in 1989 with the objective to create the most attractive conditions for foreign investors.

Burgas is not only an important industrial center in the country, it also has considerable resources for tourism. What attracts people here mostly is undoubtedly the sea. The city is a starting point for visiting the seaside resorts in the area – the Sunny Beach resort and the Elenite holiday village to the north and the Duni holiday village, renowned for its unique architectural composition, to the south. The climate here is temperate continental with a distinct impact from the sea. Every

year Burgas is visited by over 180,000 foreign and Bulgarian tourists. Seven state-owned and 11 municipal institutes foster art and culture, together with propagation of cultural values. On the territory of Burgas municipality there are 2 universities and 4 colleges teaching more than 6,200 Bulgarian and foreign students. In the Municipality of Burgas there are 27 primary schools, 28 secondary and high schools.

### **3. The innovation development for the Municipality of Burgas: a science and technology park**

Technological parks cover all agents who are directly or indirectly involved in the innovation process. In this sense, they cover both interconnections within a technology park to create a new product and those between the technology park and all agents that directly or indirectly affect the innovation process, namely suppliers, customers, competitors, consultants, universities, science research institutes, government and non-government organizations.

The emergence of technology parks as a phenomenon of modern technological development draws the interactions between the different actors as a key feature of the innovation process of the present stage. The high degree of interdependence between innovation agents leads to an increase in the complexity of the innovation process [8].

The construction of a science and technology park on the territory of Burgas should be linked to a well-founded and logically arranged strategy for communication with potential customers of innovative products. In 2004 Burgas Municipality launched a procedure for determining an industrial park in the detailed development plan of Burgas (PUP), which was approved in 2009. For this purpose, a state property was used, which was previously used for the storage of construction waste. The construction of this park is financed by a Partnership between the Municipality of Burgas and the National Company "Industrial Zones" EAD. The share of the Municipality of Burgas is 49% and consists of a contribution of the terrain on which the industrial park is built to the capital of the company and the share of "Industrial Zones" EAD is 51%.

The construction of an industrial and logistic park in Burgas aims at attracting new investors to the city as well as strengthening long-term business partnerships. Undoubtedly, any investment in an industrial and logistics park in

the city will also need support in establishing competitive advantages by generating, transferring and creating innovative technologies and know-how. This could be most useful in achieving a self-constructed science in a technology parks where laboratories that are already in operation can enter or new ones in which scientific research is carried out by teams of scientists be created. For this purpose, for both industrial and scientific parks, the existing communication system should be considered: whether it is sufficiently efficient and appropriate to the objectives of the parks as an appropriate infrastructure - roads, communications and energy highways - electricity, gas supply, water, i.e. whether the sites are suitable for work or scientific purposes. It is also important to be able to identify areas for the construction of the parks, which should be done flexibly and in full compliance with the work intentions of the potential investors. The location of the parks and their close proximity to the port of Burgas, the airport, the Trakiya Motorway and the universities is also essential.

By building here of scientific and technological and industrial logistics park aims to create or improve conditions for the development of scientific and real production activities in the city, and thereby achieving useful for any economy diversification of business by creating new industrial and scientific Activities and achieve better harmonization of the economic development of Burgas. This will also have a significant impact on the labor market, which will move from mainly seasonal employment to year-round employment of workers. Universities will also have to redirect to the demand for skilled workers at all levels of production and research, their management and inclusion in the different stages of judging innovative products. Another equally important and useful result of the construction of the two parks will be the introduction of new services as well as the improvement of the social environment in the city. [8]

From made to the moment research and analysis for development in the South-East Region of planning can be derived following vision - green path for development of the structure and interrelationships of regional innovation systems in the Southeast region of Bulgaria in the face of science and technology park based on which to develop measures to support the development of national and regional innovation and economic systems.

The role of established or start-up business can play attracted investors hampered by industrial and logistics park in Burgas. At local level (Burgas Municipality), first steps are being taken to create such a park as it is already being developed, such as entrepreneurship education in schools, and technology transfer offices are being set up, entrepreneurship centers are established and supported, start- new financial support schemes for innovation, etc.

Moreover, the most prominent representatives of such examples of scientific-research parks consider particular examples or examine "narrow" situations, how informational signal affects positively regional productivity, in particular. [7] The strategic goal for the innovation development of the Municipality of Burgas should be related to the increase of the competitor The ability of the industrial sector on the basis of viable, innovative enterprises under the market principles of transparency and equality. According to the current study, viability for SMBs in SMWS means achieving lower production costs, producing new quality guaranteed goods, improved design with improved organization, working methods and good marketing. The innovation capacity of enterprises is a decisive factor in their success. Innovation implies, above all, a certain intellectual attitude that combines creativity, entrepreneurial initiative, willingness to take calculated risks, attitudes towards social and professional mobility. Innovation also includes the ability to anticipate future needs, organizational talent, and attitude towards compliance, at a controlled cost.

The preservation and expansion of the competitive advantages of the companies' growth and development, the issue of overcoming the problems specific to the different sectors and the enterprises working in them through the implementation of adequate policies. Generally, these policies are horizontal, either whole to create favorable conditions for development of entrepreneurship, improving the business environment, promoting innovative development and investment process. The main efforts to conduct innovative policies in the Southeast region of Bulgaria can be targeted to promote innovation and technological development.

#### **4. The innovation and technological development of The South-East companies and enterprises**

The rise of competitors the ability of SMEs Southeast region is the placing of strategic objectives in the sectors and especially in those with significant export potential. These goals should be aimed at creating conditions for dynamic development of the sectors that can sell finished products on world markets. This implies fostering innovation in the production and sale of goods, introduction of modern management techniques and quality standards, training of the workforce, creating links between companies in the industries and strategic partnerships and overall these positive efforts can be implemented by building a science and technology park in the Municipality Burgas. Emphasis should be placed on creating a favorable environment for promoting technological development by:

- Increase research spending (greater investment in scientific potentiation par and basic research);
- Increase the budget of the National Innovation Fund;
- Providing information on available advanced technology and markets;
- Promoting cooperation between businesses and educational institutions in the region astta applied research;
- Creating favorable tax thirds in investment in Innovations;
- Transfer of advanced technology from developed countries to Bulgaria;
- Effective protection of intellectual property;
- Providing easier access of financing of innovative small and medium enterprises (SME);
- Promoting public-private partnerships in the issue of technological development;
- Increasing the entrepreneurial culture of the importance of innovation in today's economic;
- Formulate reliable indicators by which to evaluate the development of innovative activity of SMEs in the South-East region.

### **CONCLUSION**

Our position is that the development of municipal innovation strategy must be a process that begins by setting realistic, though simple plan to build a science and technology park in the Municipality of Burgas. This plan should be continuously developed over the coming years. In other words, the idea is to start with the establishment of a number of measures to evolve over time, not wasting time discussing "ideal" or "full" policy innovation. It is sufficiently flexible approach whose advantage is that it can begin

immediately. The need for realistic plan is also based on the understanding that policy measures will be successful only if united efforts of the whole society. The policy should be national, as it relates to national institutions and should complement other policies and strategies of the Republic of Bulgaria. It is a common understanding that the state plays an important role in the modernization of science-research and technological and logical sector and the development of science and technology parks in the regions is a national responsibility, supported by decisions of the local municipal authorities.

In this research more consideration is given to the impact in result of establishment of such science-research park on a regional place of Municipality Burgas such as properties of information and knowledge, schemes and their influence on small and medium enterprises' changes, growth and behavior, etc. [9]

The science-research and technology parks are by one means of improving the innovation of the small and medium enterprises. The role of such "parks of knowledge, science and development" is very important for the strengthening of intermediary infrastructure in the Municipality's important creation of institutes or centers for transfer of innovative achievements and products. The role of such an institution will play a Science and Technology Park in the municipality, which will organize distribution and will provide (individual or collective) innovative services to SMEs with relevant potential.

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## SACRAL SETTLEMENT-ADJACENT TOPOI AS SITES FOR CULTURAL TOURISM

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### ABSTRACT

*The study focuses on the territory of the Region of Burgas. Its populace has an almost entirely Bulgarian ethnic identity. The Strandzha Mountain is an active ethnic-cultural contact zone and ethnic identity reflexes are strongly exhibited there. A settlement's territory is perceived as a proprietary, absorbed territory, it is the core of the local microcosm with the zones around the core serving as limits: they are the borders separating the domestic from the foreign, but also the place where the two meet, communicate or compare their strengths – overtly or covertly. Sacral geography and the legendary narratives that have merged with it in the Region of Burgas are forms of ethnic interpretation of space through the means of memory. The space itself functions as a text, which contains within itself different messages about the human communities inhabiting it, be they local, ethnic or religious. The ethnology of space is above all a topography of the various community types.*

**Key words:** Middle Strandzha Mountain, sacral geography, social ideology, heterotopia, ethnic identity, local microcosm, legendary narratives

Ethnologists have long established the existence of sacral geography (in: Etnos I sacralna geografija 2012: 7): it is a form of mental structuring of space via the means of communal culture. This model of space is connected with the temporal parameters of the social ideology, it functions as a heterotopia (Foucault 1986: 23): real locations, which are the stages of society's utopias and ideas, maintained and passed on through traditional cults and oral legends.

The present study focuses on the territory of the villages of Drachevo, Rosenovo, Fakiya, Golyamo Bukovo, Dolno and Gorno Yabalkovo in the Strandzha Mountain. Their populace has an almost entirely Bulgarian ethnic identity. Strandzha, however, is an active ethnic-cultural contact zone and ethnic identity reflexes are strongly exhibited there. A settlement's territory is perceived as a proprietary, absorbed territory, it is the core of the local microcosm, with the zones around the core serving as limits: they are the borders separating the domestic from the foreign, but also the place where the two meet, communicate or compare their strengths – overtly or covertly (Moroz 2012: 46).

The topoi and the narrative forms related to them in this area share the common features of their typology.

Regardless of the diversity of landscape features, the cult activities traditionally practiced

in their vicinity, as well as their plots, they always structure and translate the communal world model through time. This model has an axiological character, it is structured along the axis of us – them, with the idea of our space being considered in positive terms, while the foreign space is considered in negative terms (Tachfel 1990: 149).

A so-called sacral precedent (Marazoff 2012: 65) is always present – it is the event that turned the featureless point in space into a value-loaded site, significant for ethnic self-identity. The sacral precedent almost always reproduces a mythological matrix – it is dislocated to the unimaginably distant or historically irreversible periods of the past.

An established cultural method for rationalising and structuring this settlement-adjacent spatial model is the naming of the site. Once named, the location is taken out of its landscape anonymity; it is legitimised in culture and is included in the community's mental area of control, while the name itself speaks of the ethnic stereotypes of the people who have faced and tackled their destinies, in reality or imagination, within the specific point in space.

Cultural-narrative phenomena in the studied region can be generally categorised in two representative groups.

The first can include seemingly ethnic and religious-neutral complexes.

The second includes local phenomena, which have an expressed ethnic conflict character.

We will present these two groups of sacral topoi in order.

Three topoi belonging to the first group are related with the so-called Marko cycle. About 2.5 – 3 km away from the village of Drachevo stands a century-old tree known as Krali Marko's Cane.

It is crooked and looks like a giant crutch. According to the legend, it served as a walking stick for the hero who passed through these lands. The people never cut it, so that they would remember Marko's passage through the region.

In the area of the village of Dolno Yabalkovo there are two more sacral topoi which belong to the Marko corpus. One of them is called Marko's Stone by the locals. It is located 2 km southeast from the village and is a large egg-shaped natural rock, supported by several adjacent smaller rock formations.

According to the legend, the stone once stood upon the hill of Markova Tumba near the village outskirts. Marko, however, was mistreated when his father's heritage was divided; he felt angry and pushed the rock with his pinkie finger, throwing it all the way to its current resting location.

On the smooth top surface of the rock there are two indentations which are believed to be Marko's footsteps. It is believed that drinking water from them, as well as squeezing under the rock, can treat infertility.

Krali Marko is the primary protagonist of the southern Slavic folklore epos, as well as of an entire legendary cycle, as he was a symbol of ethnic resilience, superhuman strength and health. The hero's name, his presence in the area, even if only imaginary, is apparently rationalised as a toponymical and verbally anchored code of Bulgarian identity.

Within the area of the nearby villages of Dolno and Gorno Yabalkovo, almost in the middle of the imaginary four-kilometre line that connects them in the direction northeast-southwest, lie the ruins of a late Roman fortress. The local populace calls this place Kervasaraya and tells the following legend: it was once a castle built by three sisters – Kerva, Sara and Yana, and there was a tunnel underneath it, leading all the way to Odrin, and this castle stood right in the middle of the road between the Black and the White Seas (the Aegean).

The site's original name certainly was Caravan Sarai, and it is very likely that there really was a large inn offering shelter to merchants who constantly travelled across the Strandzha to Odrin, because this is where the so-called Diagonal Road built in Roman times passed, connecting the Black Sea ports with Thrace and the Aegean region.

The legend, however, aims to justify the site's name in terms of its own language, in Bulgarian. Odrin was considered to be a Bulgarian city, populated by compact Bulgarian groups, even during the Ottoman period. The Kervasaraya supposedly marked the exact middle point of the road between the Black and the White Seas. Measuring, scaling and working with measures and numbers was a sacral technique of structuring space and time in traditional societies.

The second group of acute settlement-adjacent topoi openly expresses ethnic stereotypes and activates historic collisions through plots borrowed from mythology. One such topos, which is based upon the tragic clashes on Bulgarian ethnic territory, is Gelin mezari, the Bride's grave. According to the legend which is circulated in the narrative complexes of the populations of the villages Fakiya, Rosenovo and Debelt, a great wedding procession passed through the woods many centuries ago. Daali marauders attacked the wedding and slaughtered everyone, from the bride and groom to the oldest woman. The bodies remained there for several days, unburied and desecrated by the wild beasts, until all the wedding-goers turned into vampires, and thus the place was considered cursed and no one dared go there anymore.

The location and the legend are apparently based upon two primary cultural fragments. On the one hand, they demonstrate the established ideas of Balkan mythology: wedding-death; demonization of violently killed and improperly buried characters. On the other, this complex is obviously a reflection of deeds and events, which were not uncommon during the troubled times of Ottoman rule, especially during the times of the Daali marauders, when the Ottoman Empire itself was incapable of dealing with these outlaws.

About 3 km away from the village of Drachevo is a topos known as the Two Graves. Legend relates this place to the village's old history. During the last Russo-Turkish war, when Osman Pasha left these lands, he threatened to burn down the village. The villagers sent two young men, Georgi and Stanko, who climbed upon the

highest cliff to keep watch as sentinels. The Cherkess, however, attacked them from behind, caught them and beheaded them. This is where they were buried initially, giving the place its name. After the Russians arrived, however, they dug out the bones and buried them with full military honours in the village cemetery.

International clashes can also give rise to exactly the opposite plots, where our own take revenge on the ethnic aliens for offenses inflicted by them. Such a topical-legendary complex is Shaban's Grave near the village of Golyamo Bukovo, about 3 km northeast of the village. According to the local legends, it was the burial site of a Turkish man named Shaban, who was killed by a Bulgarian out of revenge and then secretly buried there.

The presence of members of a foreign ethnic group in the region can be proven via more locations and legends. Somewhere near the village of Drachevo there is an area known as the Hellenic Graveyards, lying about 2 km to the east. It is a barren plain littered with large sharp rocks that emerge naturally from the ground. According to the legend, the Hellenes went there during Byzantine times to conquer these lands, yet they died and this place became their burial ground. It is considered to be a bad and unclean place, and that's why it is believed that walnut trees should never be planted there.

It would be too hasty to assume that Hellenes means Greeks in this case. The people of this region believe in the existence of demonic entities, which they call Hellenes. They, according to the legends, were evil man-like creatures, giant in stature, dwelling in abandoned mills and appearing before late travellers at night, in order to scare them. These characters' name, being an ethnonym for the other ethnos, indicates one of the main features of the reaction towards ethnic foreignness – interpreting it as demonism, and relating it to reactions of fear and hostility (Mitceva 1991: 194).

Sacral geography and the legendary narratives that have merged with it in the region of Sredna Strandzha are forms of ethnic interpretation of space through the means of memory. The space

itself functions as a text (Toporoff 1983: 227), which contains within itself different messages about the human communities inhabiting it, be they local, ethnic or religious. The ethnology of space is above all a topography of the various community types.

Therefore these places can be attractive sites for rural and cultural tourism. Tourists are attracted by their simple, rural way of life and their unspoiled, tranquil environment. These are the characteristics that cause their more affluent and powerful neighbours to regard them as backward. By developing tourism they can modernize and escape from the stigma of backwardness (Boissevain 1996: 8).

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## GLOBALITY AND LOCALITY – CULTURAL AND HISTORIC HERITAGE AND CULTURAL IDENTITY

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### ABSTRACT

*In the circumstances of the globalizing world cultural and historic heritage, cultural identity and tolerance are social phenomena of increasing significance. Something more, some of the most important changes and problems in the way of life of modern man are focused in them. Where are these points of intersection and what are they due to? In what sense have the phenomena of tourism, identity, tolerance and historic heritage been turning more and more into interdependent processes? How is the national historic heritage reflected in the mirror of international tourism in the circumstances of “globalism” and “locality”?*

**Key words:** *globalism, locality, historic heritage, cultural identity*

### **Local and global as an opposition of two types of cultural thinking**

Discussing the concepts of culture, cultural heritage and identity, we inevitably face an opposition the analysis of which lately is particularly topical in the humanities. This is the opposition between the new global culture, which is culture of modernism, on one hand, and the traditional, the inherited culture from the past, which closed human existence in the narrow frames of their village or region and regulated life by conservative great old traditions. This is an opposition in which things cannot be explicitly defined by the signs “plus” and “minus”.

The characteristics of modern culture (we have good reason to define it as cosmopolitan) referring to the discussed topic, can be most briefly synthesized in the concepts of “universality”, “globalism”, and “locality”. The ideas and values of modern people, living in the greater part of the world are merging today. The stereotypes of life have become unified. The distances are easily overcome. It has both its good and bad consequences. You can feel at home everywhere, but when you are “at home”, you get bored and then you look for something different, something exotic and unfamiliar, and something... local. That means the problem of local, of local culture has been put sharply in particular today in our globalized and tiringly unified world as a counterpoint of the general

unification which is, in fact, a total depersonalization.

The significance of local culture is great because it feeds up the identity – group, village, ethnic, cultural and because it keeps one of “the most much in demand commodities” in the global epoch – the cultural difference.

Globalization influences tourism mainly on two levels. Though in fact they are closely connected for the sake of the learning purposes it is advisable to draw a line between them[1].

a/ One of the levels refers to the prerequisites and conditions for implementation of tourism as an activity. We can call this level “infrastructural level”.

It refers to the transport infrastructure, to the character of the information system, to the structuring of work and free time and etc. These are factors which essential change in the process of globalization leads to transformations in the conditions, character, scales and directions for the development of modern tourism.

Globalization reveals new opportunities for international tourism boom by the explosive development of air transport and its cheapening. A global freedom for quick movement is being created with the help of air transport: the world seems to fit the tourist – there is nothing inaccessible because of its remoteness.

Globalization stimulates the growth of tourism by the global electronic information and communication technologies and networks as well as by global media. The researchers of these processes have observed that the modern tourist is much freer but at the same time much more demanding in their choice of destinations and also much better informed in advance what to expect reaching their destination.

b/ The other level refers to those changes in the life style of modern man which are caused or at least favoured by globalization and are directly related to the motivation for tourism.

The question is about the changes in life of modern man that cause a particular “will to tourism”. This level can also be called “a level of meta-motivation for tourism”. The so called deterritorialization of life of modern world people, the demographic aging of the developed societies, the new type of use of free time and etc. are among the factors of this level.

A number of factors which change the social significance of the physical destination of man’s life lie in the basis of deterritorialization – these are the mobility of modern people, their participation in the network of transnational business, their involvement in activities of global scope, as well as the intensive migratory processes without losing relations with home places, the virtual network, global media, internet, and etc.

Today’s people are deterritorialized in literal and figurative sense. The boundaries of their personal environment, of the space in which they develop themselves and live are not the boundaries of their town or their country. People in the developed societies choose how to identify themselves among a repertory of opportunities for contacts, socializing and even working which exceed their residence. On one hand this type of people are willing to travel farther and farther, to reach unknown lands, to get to know different cultures. Since their identity is not predetermined by the place of life and the place often changes, this type of people are constantly thirsty for novelties.

On the other hand the plurality of life styles in the developed societies diversifies the motivations for tourism. In the global epoch the interest in disappearing cultural forms gets a specific advantage. Namely the rapid disappearance of pre-modern cultures makes them especially attractive as places of tourist consumption. As some of the researchers of this process like to joke, the tourists are quick to find

“a chance to see the past before it has disappeared”.

Generally we can say for sure that the broader the spectrum of life styles, caused by deterritorialization of human existence in the process of globalization, becomes, the more various the motivation for tourism will be.

Demographic aging of population is also a stimulus for cultural tourism. According to analyzers the social-psychological and market behavior of the “third age” in Western Europe has been undergoing radical changes. Global man is not so physically worn out as their ancestors, and they are not inclined to devote sacrificially their time to bringing up their grand children. The value system of modern adults has been formed in an open and, to a certain extent, consumer society.

That is why, namely, this age group has an active attitude to tourism and especially to cultural tourism but at the same time it is also a bearer of identity and a connoisseur of cultural and historic heritage. Sociologically it has been found out that this group is exactly the main contingent of cultural tourism. During a research of the attitude of Europeans to tourism it has been established that for the tourists of age 15-24 years the Sun and beach are the basic motive while for tourist above 54 years of age the motive is city trips, cultural and religious tourism as well as eco-tourism [2]. Presently it even happens that the prospects for the development of cultural tourism are mainly based on the interests of the “third age” in the developed West European countries.

Globalization creates a new configuration of social time in the developed societies. This new configuration is reflected in the greater mobility and in the fragmentation of vacation time. This process favours the development of tourism, and also it increases the demand in the sphere of cultural tourism. It seems that the time of 20-day holidays during which families rested in the chosen destination has gone for good. The thirst of modern man for more and more impressions, for vehement movement and consumption of more and more exotic makes them choose short, multidirectional destinations, as often as possible.

#### **Cultural and historic heritage in the context of cultural identity**

“Identity” is a concept which is hard to define. The reason is in the multiaspectuality and broadness of the content which goes into this concept. It will be enough to focus on the various

forms of collective identity for the purposes of the present paper. It is appropriate here to emphasize that individual and national cultural identity have similar structures and the analogies between them are completely reasonable.

When we define identity, we have to pay special attention to its following characteristics:

Firsto: Identity is self-sameness of the individual or of some human society (local, national, European, and etc.). It is a self-sameness which is preserved despite the changes carried out and experienced.

The famous psychologist Erik Erikson who even at the end of the 30ies of the last century tried to put this concept in use, defined human identity as “a subjective sense as well as an observable quality of personal sameness and continuity” [3]. Identity means simultaneously permanency and changeability, identity and difference, it means the availability of one and the same which, however, changes. As the man who undergoes considerable changes in their biography but remains the same person, so the cultural identity of some society (local, national, regional and etc.) remains permanent despite the changes. That is why rationalization the national cultural identity is both a “picture” of the result, description of cultural originality of the nation but also historical story about the nation, about the qualitative changes it has undergone in its historical biography.

Identity is a process and a result; it is a complete acquired image of the person or of the corresponding society of itself, which, despite the changes, maintain the sense of unity and continuity of man and of human society.

Just because it is a long-lasting change and also such a long-lasting permanency, national cultural identity contains the whole history of the corresponding national “body”. It contains even those parts of this history which have been forgotten or have been demanded to be forgotten. Cultural identity is a result of what has happened in history not only the desired, attractive, positive remains of this history.

Second: Identity is constituted by memory work. It is Jean-Jacques Rousseau who we owe our understanding that without historical memory there is no identity because thanks to memory man becomes really united, identical to themselves. Saying this with his words: “to be yourself, it is necessary to remember yourself in past”. This is true both for the ordinary man and human societies including nations. There is no national identity without national memory and

active historic and cultural heritage. We have to point out in this sense that memory as a condition for national cultural identity is not a passive mechanism for reproducing the past into present. It plays a very important role, and it is capable of producing if we use the expression of the literary scholar, Svetlozar Igov, “retrospective utopia”, i.e. memory not only brings past into present but invents some past that did not take place and forgets the other part of the past.

Third: Identity is double determined - objectively and subjectively. National identity, for example, contains and is determined by a number of objective components: by the rights of the corresponding nation, by its habits, by the character of the national language, by the national temperament, by the peculiarities of landscape in which nature is embodied and also the character of the co-existence of this nation with nature.

Even the manifestation of specific sense of humour of different peoples - German humour, British humour and etc. – is part of this objectiveness of national identity. But at the same time identity is built and maintained by a number of subjective components and mostly by the conscience of the corresponding society that it is not only an object but also a subject, an active constructor of their national destiny.

Identity has a double nature in one more sense – it is both a fact and attitude. It is a fact as far as objective peculiarities of the national history lie in its foundation, and as far as it is a result of what “happened” to a certain nation. But at the same time it is attitude because both the specific individual and the corresponding local, regional, national society develop in the course of comparisons, correlation, and opposition. The thesis of Anne-Marie Thiesse is true and it states that “nothing is more international than the formation of national identities” [4]. Both man and nation get awareness of themselves by comparison to neighbours, friends and enemies, generally – be comparing to “the others”. Their eyes open for their own originality when they have the opportunity to compare to the identity of other people, to other nations. Identity becomes “visible” when meeting other identity. It is so because identity is like an iceberg – the visible part is a small part of the whole which remains hidden, impenetrable, and vague. Cultural identity has a relational nature in one more aspect. It is a manifestation of how a given

nation values itself, how it rates its place, its role in the world, in the region; what beliefs and myths about itself support its existence. But together with this, identity is determined by the way the rest of the world views this nation. It is a field in which there is a permanent, continuous play between three different images – the image of oneself, image of the others and others' image of you.

A few decades ago this concept was not used scientifically it existed neither in the field of science, nor in everyday language. The concept "cultural identity" was first used in official international documents at the World conference of UNESCO in 1982. In the final report at the World conference of UNESCO in Mexico /1982/ cultural identity is defined mainly as a dynamic process of the development of a society preserving its specific differences, allowing a change without alienation. In this document identity is treated as a constant and individual way of people their society and culture to be true to themselves [5]. Now the frequency of its use is unbelievable – this concept is one of the most often used and discussed in the humanities and social studies, in journalism, in everyday life. The explanation of this unusually quick ascent is not that until the 80ies human or national identity did not exist but lately it has turned into an exceptionally serious humanitarian, cultural, political problem. Identity has turned into a source of great trouble.

What is the role of cultural and historic heritage in the international tourism in the context of the problematized identity? As we have already said the problem of cultural identity, of human identity at all stands in the focus of science in the first decades of XX century – almost at the same time when the global epoch and intensification of tourism, (including cultural tourism) as a power economic and social regulator in modern world began. This shows that these three phenomena of modernity: cultural identity, cultural and historic heritage and tourism are connected and interdependent. Where is the intersection of these phenomena?

International tourism has much in common with cultural identity and with the approaches to finding a way out of this crisis of identity.

a/International tourism is a factor which breaks the traditions in the globalized way of life and at the same time it is a stimulating factor for the growing interest in cultural

heritage, in exotic in history, in the uniqueness of national cultures, a factor of nostalgia for the past times.

b/ International tourism brings a collision between two basic identities: the cultural identity of tourists and the cultural identity of hosts in the sphere of cultural and historic heritage. Modern analyzers already give their critical evaluation for the influence of international tourism on the culture of the visited countries. This criticism concentrates on the superficial interest of the tourist and their inability to understand the culture and the cultural and historic heritage of the visited country.

One of the possible answers to this challenge can come by heightening the intercultural competency of tourist personnel.

International tourism has a lot of common intersections with the problems of individual and collective identity. It is connected both with the sources of problemizing of identity and with the ways through which a way out of this crisis of identity has been searched.

First: International tourism is both a factor and a manifestation of detraditionalization in the globalized way of life. But together with this it is a stimulating factor for the patrimonialisation of the modern world, i.e. for the nostalgia for the past time, for the growing interest in the cultural heritage, for the exotics in history, for the uniqueness of the national cultures.

Life of a considerable part of the world's population goes "on wheels". The increasing freedom of choice of place to live and work and the extending scope of tourist travels are among the main sources of emancipation of modern people from local or national traditions of the country they were born. Freeing themselves in one or the other extent of their national "place", of their national cultural heritage modern people begin craving for heritage in general. According to the precise observation of the French historian F. Hartog "the worried present has begun searching for roots and identity, has become aware of memory and genealogy [6]. The natural, self-working national memory is being replaced by a volitional memory, by a search for the miscellaneous human past all over the world. The age we live in is marked by a real race for gaining and touching cultural and historic heritage. We live in time producing "tendency for making heritage of everything" [7].

International tourism is one of the brightest manifestations of this incredible strive to follow

the traces of the lost memory. Thus it is both a factor and a manifestation of the detraditionalization but together with this it is a factor and a manifestation of searching for all kinds of traditions. In this sense international tourism not only problematizes but also activates the cultural identity of a separate person and of whole nations.

Second: The effect of international tourism on the cultural identity depends to a great extent on the quality of the cultural mediation of the tourist personnel. Making a survey of the cultural influences of international tourism, Marion Thiem points out that even in XIX century there was a clearly expressed critical assessment of the influence of international tourism on the culture of the visited countries [8]. This criticism was focused on the problem that the tourist showed superficial attention and lack of understanding the culture of the visited country. This lack of understanding has a double effect. One is on the tourists: the superficial attitude to the foreign culture deprives them from the opportunity to broaden their own cultural horizon. The other effect influences the cultural identity of the visited country. But the identity is an attitude rather than a separate, objectively defined fact. It builds up and functions by correlation and interaction of several images – “image of oneself”, “image of the others” and “others’ image of you”. The crisis of identity can be caused by various reasons – self dissatisfaction or non-recognition from outside. The identity is misrepresented for example by the interiorization of a wrong somebody else’s image which is gradually accepted as own identity. The effect of bipolarizing of identity-when you are yourself and when you are the way you want to look in the eyes of others - is eroding. This bipolarizing is common not only for a separate person but also for national cultural identity. And here tourism happens to be one of the main factors for such bipolarizing of the visited culture which very often prefers to presents itself in the way tourist would like to see it or the way we think tourists want to see it.

The British researcher Cris Ryan wrote more than two decades ago: “If we use the words of the great Shakespeare that all the world is a stage and all men and women merely players” then at

the end of XX century the tourists will be the audience” [9]. Chris Ryan wants to tell us that the modern tourism orders the “local” culture not to be only itself and not so much itself; as far as acting is concerned tourism should play the roles expected by the audience which can happen to be dangerous for its identity.

One of the possible answers to this challenge can come by heightening the intercultural competency of tourist personnel, excellent knowledge of national cultural and historic heritage and influence on tourists.

Structuring of tourism as a sphere of intercultural interactions makes it possible to distinguish four types of cultures [10] – culture of the emitting country, culture of the tourists (in which the specific culture of free time is added to the corresponding national culture), culture of the host country and culture of the tourist sector personnel. Each one of these cultural types has its peculiarities and differs from the other types.

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## ALTERNATIVE SOLUTIONS IN TOURISM IN THE CONTEXT OF MARKETING OF RELATIONS

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### ABSTRACT

*This paper clarifies the conceptual essence and the role of the "Relationship Marketing". The author's aim is through theoretical aspects and formulations to prove the necessity of applying the type of marketing in the field of tourism, and on this basis to indicate alternative solutions for successful marketing management.*

**Key words:** *tourism, marketing of interconnections, alternative solutions.*

### INTRODUCTION

In today's tourism business, the issues of successful building and development of company relationships with end-users are becoming more and more difficult to solve. In view of the transformation changes, the reformation of the tourist market has been observed, which implies the adaptation of the tourist players to the changes in the market environment. The tourist of the 21st century is characterized by its strong awareness, flexibility, mobility, independence and unpredictability both in its choice of tourist destination and in the consumption of a particular tourist product. These circumstances are a clear result of both globalization processes and technological developments (information, communication, booking, transport, digital and mobile). The changes outlined allow continuous and easy access to the tourism market in a hypermedia environment through the Internet, on the one hand, and on the other hand this access provides a virtual and interactive connection between all the participants in the tourism activity. Contemporary tourism demand is unprecedentedly fragmented into niche and personalized products like never before. This necessitates a change in the transformation of supply - from universal and standardized tourist products to unforgettable experiences and long-lasting relationships between the service provider and the ever-demanding consumer. The increased and deepened competitive situation among the companies in the tourism sphere has caused not only the expansion of the range of goods and services offered, but also the shortening of the life cycle of the product, but

also a change in the approaches of the whole company management. The uncertain and volatile macroeconomic environment leads to a distortion of economic information and to the increase of uncertainty in the taking and implementation of economic decisions by firms [12]. The need to reconsider marketing activities in micro markets is a prerequisite for the evolution of marketing and leads to changes in the marketing management of the modern tourist enterprise.

In this context, we come to a conclusion that provokes the search for alternative marketing solutions by the tourism business. "Marketing of interconnections" is a good opportunity, as its philosophy is oriented towards more efficient modern corporate governance. The purpose of the author in this article is through theoretical aspects and formulations to indicate alternative solutions for successful marketing management. The objective pursued defines the following theoretical-research tasks: (1) to justify the necessity of changes in the marketing of the modern tourist enterprise; (2) clarify the conceptual nature of "interconnection marketing" and take into account its role in tourism.

### MODERN CHARACTERISTICS OF TOURIST MARKET

Today's dynamic environment makes us see ever more diverse market realities in the economy. A leading trend in the modern tourist market is its functioning at an interactive level. Moreover, globalized trips provide opportunities

to accumulate rich tourist experience from previous trips, allowing the tourist to compare and assess the value of the tourist product and to choose the best value for money. Also, the tourist now has real time information about the price offers, which bases the decision of the tourist to travel to become price-oriented. In the era of globalization, the tourist market has been radically changed. In addition to operating at an interactive level, it is "totally fragmented" with extremely heterogeneous, wider patterns of behavior.

People's styles of life are changing differently, leading to a multiplication of value orientation and diversity in tourism motivation.

The changes observed lead to a variety of characteristics and behavior of the modern consumer. Due to the topicality of the problem, in the specialized scientific literature the peculiarities of the modern tourist market are considered by many researchers in the subject area. According to S. Marinov, "the new tourist with its multi-layered needs and behavior goes beyond traditional traditional mass tourism and mountain holiday tourism, as it is dominated by the desire for something new, different, real and allowing for real mental and physical rest" [1]. In turn, S. Rakadjyska adds that the modern individual is a polymorphic / multistructural tourist who is interested in the beauty of nature, archeology, architecture, pop culture and religious shrines, sporting events and national cuisine, folklore and social contacts, extreme experiences, self-education etc., while simultaneously seeking "more civilization" in cosmopolitan cities and cultural, historical and entertainment centers. [3] The variety of the characteristics of the modern tourist's behavior can continue with the demand for more stay in nature, adventure, exotics, risk, sport, along with the classic products combined with recreation, culture and culinary. The new tastes of the modern tourist are related to exotic, adventurous trips with long journeys, but also keeps interest in short, daily and more frequent visits. The "new age" tourist is educated, intelligent, informed, he wants to establish new contacts with the local population, wants to be well received and accepted, to integrate into new circles.

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The modern tourist realizes that he is a participant in the "over-supply" market. This makes it flexible and inconsistent with the consumer criteria involved in making tourism

decisions. The interest in products with the potential to create a special emotional connection with the tourist is emphasized, the demand is oriented towards "emotionally focused, attractive, animated, intense, provocative imagination" [1], a rich tourist product combined with specific national characteristics.

Changes in the values of tourists, influenced by fashion trends, predetermine the task of tourism companies, on the one hand, to create a "hit" product combined with a unique, different and unknown element and, on the other hand, a product that preserves the authenticity, tradition and the true nature of the destination. On the other hand, fashion trends tend to shorten the life cycle of the product and require travel companies to implement a flexible product policy in their marketing management.

The "mass tourism" has already transformed into a globalizing world, it is pretentious, with high requirements for convenience, security, entertainment, romanticism. In response, the business has the opportunity to go out of a "ready-made" tourism and to reorganize the client's "custom-made" travel offers [1]. The trivial All Inclusive format gradually saturates the participants of the tourism market from the point of view of unified products.

Today, the tourist wishes to meet his multiple needs at the same time and his decision to purchase is not based solely on the functional qualities of the product. Therefore, it is necessary for the tourist organizations to realize that the competition between them is related to the provision of a "consumer experience" and the tourist can be conquered by an adapted approach, causing emotion and a lasting memory. The tourist seeks personalized contact when special attention is needed, advice, advice on a particular destination, places to visit and entertain, when using services, etc., or sometimes to feel the "pulse of the place" [4]. The task of marketing at this point is to balance the personalized contact with the tourist during the service and the specialized tourist product, which has the potential to create a special emotional connection with the tourist.

Consumers are more capricious and more experienced in managing information and creating and sharing digital knowledge, exchanging information and interacting intensively with each other and with producers as with equal partners.

The interest of the "new tourist" for tourist travel is increasing, with a priority focus on his

experience. The interest in an individualized tourist consumption of the tourist is increasing, contributing to his self-assertion and improvement. The knowledge economy has changed the roles of all actors in the tourism business as an increasingly important role played by consumers themselves.

Responding to changing tourism needs and behaviors, it is a good idea to change the marketing approaches of tourism businesses by applying concepts such as "relationship marketing", "marketing of experiences", "marketing of influence", the main purpose being to individualize the relations of participants in the communication and transaction process.

### **THE NATURE OF THE CONCEPT OF "MARKETING OF MUTUAL RECREATION" IN TOURISM**

For the needs of the chosen problem, it is appropriate to clarify the conceptual nature of the interconnection marketing. The definitions of this modern paradigm are extremely varied in content and complementary. A broader definition could be used as a fundamental one, which states that the marketing of interconnections covers all marketing activities aimed at establishing, developing and maintaining successful customer relationships [7]. Some authors add that the philosophy behind this philosophy is customer retention, with interconnections making it profitable to meet the objectives of all actors, and even when necessary, these links can be ended [5].

Interconnection marketing is an extension of the marketing concept brought about by the dynamics of the digital age. In the application of interconnection marketing, attention is focused on the overall mutual understanding between the seller and the buyer and not just the exchange between them. It consists in building and maintaining relationships where potential clients turn into real, and real clients - in supporters and friends. One of the significant features of interconnection marketing is cooperation.

Relationship marketing focuses on the tourist with all his features, taking into account aspects of his life at a specific moment and circumstances, with the goal of transforming each transaction into a long-lasting relationship. The introduction of modern information and communication tools and technologies allows the tourism business to have a fairly accurate analysis of the needs, as well as the application

of an individually differentiated approach, helping to maintain a relationship with the tourist. The modern consumer is in constant expectation of evidence to justify his loyalty to a particular brand. In this context, interconnection marketing seeks to maintain a core of loyal customers.

By analyzing existing theoretical aspects, we can define the marketing of interconnections in tourism in a number of directions - (1) as a contemporary conceptual solution combining the use of value-added marketing approaches, techniques and tools (2) as a modern strategy allowing the construction and maintenance of individualized relationships with customers, in order to create and constantly affirm in them permanent, positive attitudes, loyalty and attachment to a particular company and / or brand. The proposal to create long-lasting value for the customer is made by Kotler, who says that a measure of success is the long-term customer satisfaction [9]. The marketing of interconnections with end-users has a favorable development ground exclusively in the field of services and more precisely in the integration of the product's production process with the service itself [10]. Even with standardized service, marketing activity continues in the "production - consumption" process. It is no coincidence that these development opportunities are inherent in many activities in the tourism industry, although it lacks one of the important opportunities for developing customer relationships - namely the possibility of additional service after the end of the product's consumption process. It is therefore necessary to mark the interconnection marketing as an alternative paradigm against the backdrop of classical marketing, without the absolutisation of the place of the first one, which receives little criticism in theory and practice [11].

### **THE ROLE OF MARKETING OF VALUE-BASED CONTRIBUTION (OUTPUT BENEFIT) AND LOYALTY**

The basis of interconnection marketing is the creation of value - both for the benefit of the company and the customer [6]. The specific in the field of tourism is that in the development of the relations between the specific companies and their potential or current clients, the value is created and transferred with the active participation of the latter. In other words, this implies that the tourism business has the opportunity to upgrade each of its offers



differently to any individual client in the mass market or a specific market segment. The specialist literature also uses the term *tailormademarketing*, which is also relevant to small business strategies, which in turn tend to break down the market segments of large firms and tend to individualize their services in highly specific and relatively narrow product ranges [2].

The task of the participants in the enterprise is to take into account all the characteristics and circumstances of the client in their quest to transform each transaction into long-term relationships, based on the principle that the purchase is only one stage of a complex and complex process. The use of modern information tools allows for a fairly accurate analysis of needs as well as the use of an individually differentiated approach, helping to maintain long-term customer relationships. The modern consumer is in constant expectation of evidence to justify his loyalty. In this context, it is required to build an interactive relationship for maintain loyalty by: sending personalized messages; Improvement of services in the phases of the online survey - planning - booking; attendance at each stage of the trip preparation (organization, purchase, consumption, user feedback); creating useful value and usefulness of tourist offers. Provoking her retaining customer interest can be achieved by properly identifying their needs, desires and expectations about the usefulness of tourism services. In his dealings with the tourist enterprise, the client particularly appreciates the security - keeping promises and responsibility - the willingness to cooperate and help in servicing and consumption. In order to build and maintain individualized relationships with customers, it is also appropriate to use product and price differentiation, specialized for perspective segments of the particular tourist enterprise. Its application is related to offering tourism products and integrating into a single personalized service technology.

Leaving aside the fact that regular customers are vital to the foundation of any successful business, even today, some companies perceive the value of their customers for granted. In quantifying the value of the current or prospective client, the organization can easily determine how serious its loss or acquisition may be. Only after the clarification of the questions - what and how it affects the value of the clients, an adequate management of the relationship with them can be achieved, and thus optimizing the profit. To develop a business in today's difficult

economic conditions, it is necessary to use analytical tools to understand and deepen customers' understanding of the factors that affect their value, loyalty, and benefits. Companies can calculate how many business goals affect revenue and cost-sharing efficiency of client interaction resources. Customer relationship management systems are designed to automate sales, improve customer interaction, and consolidate data for analysis. Customer Relationship Management (CRM) - Customer Relationship Management is appropriate for each sales organization or call center. They play an important role in efficient, immediate and low cost communication with the customer. the work generates large amounts of valuable data for customers, and the system does not solve the problem of the manager - who, when, and what to assign - the need for intuition and powerful analytical tools combined with the appropriate infrastructure in the organization. the results will show what customers want and how to predict this with the utmost accuracy, and only after a thorough study of customer expectations can the exact proposal of the right customer be made at the right time. customers based on: up-to-date data, understanding the current situation and assumptions about the future.

Analytical methods provide a deep understanding of customers and their expectations. The company clarifies what the buyer wants and can predict its actions. With this knowledge a significant competitive advantage arises: the ability to manage the future situation and improve profits. To date, a vast array of analytical technologies has been available, starting with key metrics and statistics, and reaching the potential of OLAP technology, data mining, and predictive modeling. Each of the methods gives some information about the client, with each of them having data and analytics for a deeper knowledge of the end user. The difference is in time - real, discreet or campaign-based. The combination of all the technologies in the analytical environment creates a broad application of the collected information that can be used within the organization, provided in the most convenient way, with deep analysis without being hidden by the user and the slightest detail.

Today there are many easy and inexpensive ways to get a lot of customer information, while respecting all concepts and privacy policies. If we do not implement these data successfully, our competitors will gain an advantage. Customer information is the most important part of any

successful business strategy, and to make the most of these data should be seen as a strategic resource.

A fully integrated analysis environment brings enormous benefits to customer relationship management organizations. It can provide a good mix of analytical technologies, starting with indicators and reports and ending with predictive models and customer ratings in real time. This environment allows organizations to learn from customer behavior patterns, manage and control them. If any modern tourist organization views client information as a strategic resource, it means that it has already laid the foundations for customer relationship management. Applying analytical platforms to support CRM strategy leads to expanding the range of day-to-day operations, providing a thorough understanding of the customer base, and helping to assess consumer expectations. This makes it clear what customers want and therefore predict their actions. This knowledge provides significant competitive advantages - the power to manage the situation in the future and increase revenue.

Customer Relationship Management (CRM) unites the potential of relationship marketing and information technology to create mutually beneficial, long-term relationships with customers and other key stakeholders.

Customer relationship management consists of sophisticated software and analysis tools that integrate customer data from all sources, analyze them in depth, and apply the results in strategies for building stronger and more productive customer relationships. Hotels have the ability to use CRM to assess the value of each individual customer, identifying the most lucrative target markets, and adapting their products, services and interactions with each customer.

CRM in tourism requires not only technological quality or systems but also an efficient service concept as well as appropriate operating procedures. The success of using CRM is directly related to active employee involvement in the organization itself. For example, the Aldemar hotel chain has created an information-based strategy called The Aldemar Group Login Area to manage key customers by offering individual special offers and ongoing support. Another example of customization has been achieved by the hotel chain Leading Hotels of the World. Every client who visits and registers in the company's extranet is segmented with the hotels and services of which he is

interested and the information about his role in buying. The next visit to the system automatically provides information corresponding to the previous search of interest (for example, business hotels outside the city center if they were originally selected).

The CRM abbreviation contains the "R" element, which requires a distinction to be made between personal relationships and relationships relating to sales and purchases (ie, market relations). As a rule, relationships imply some form of interaction between the parties over a certain period of time. This means that the single transaction (incidental purchase of a product that is likely to never be repeated) does not represent a relationship between the parties. The term "relationship" can be defined as "a series of episodes of interaction between two parties within a certain time period." Separate episodes can be linked to various activities such as: searching for product information (the service); comparison of alternative offers; organizing a meeting on the occasion of the purchase, etc. "Relationships relate to situations in which the participating countries move from a state of independence to a state of dependence or interdependence." [13]

The marketing of interconnections has the character of a strategy that strives for an increasingly individualized relationship with consumers. Basic principle is to collect customer information in special databases, then analyze the contribution of each user to the company and stimulate it to permanently bind to the company and / or the brand, ie. interconnection marketing can be basically decomposed into three parts: information gathering, analysis and stimulation. To these phases, it is appropriate to complement the ideas of segmentation to build relationships with specifically selected users, coordination and proofing (highlighting evidence of loyalty to the company). It is a precise, purposeful way to create customer loyalty through a long, personalized relationship policy. What is special about this is that personalized service delivery does not become an intrusive and aggressive intrusion into the client's privacy. Companies that deliver personalized solutions for the tourism industry will have to act with care not to become intruders. Most major technology companies in tourism see personalization as the next stage in the development of communication between the tourist and the hotel, the airline or the destination. Companies with the most data will eventually have the greatest chance of

providing personalized services related to alternative accommodation solutions.

### CONCLUSIONS

Nowadays, with the development of information technology, the marketing of interconnections is realized through various company strategies, through which this concept is revived in a new kind of market environment. Relationship marketing focuses on the company's overall, long-term strategy and, depending on this, tools that can directly influence customer attitudes and encourage it to engagement are used.

However, it is important that the application of interconnection marketing is precisely tailored to specific tourism segments in order to obtain the desired impact on the consumer behavior of each target segment.

Alternative solutions related to the application of interconnection marketing can be summarized in several ways: to succeed in introducing new products; to form a positive attitude towards existing products; to achieve a competitive advantage; to create loyal customers, the ultimate goal being to create value - both for the benefit of the company and the client. It is especially important that the applied marketing of the interconnections be precisely adapted to specific tourist segments in order to obtain the desired impact on the consumer behavior of each target segment. The new market conditions set the leading role of interconnection marketing as a modern concept and tool for market-oriented corporate governance to develop and enhance business competitiveness.

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## CHALLENGES OF EUROPEAN UNION FUNDING OF TOURISM SECTOR IN BULGARIA

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### ABSTRACT

*A key structural problem of Bulgarian economy is the competitiveness of tourism sector as a leading national sector, actually bringing about one seventh of Bulgarian Gross Domestic Product. Therefore, the funding of this sector by the Structural funds of the European Union is a great issue in economic theory and practice in Bulgaria. The present paper is focused on the assessment of possibilities of European Union funding of Bulgarian tourism sector and the influence of this on the diversification of Bulgarian tourism product and of improvement of competitiveness of Bulgarian tourism companies and tourism sector as a whole on the international market.*

**Key words:** *tourism sector, Bulgarian operational programs financed by the Structural Funds of European Union, approaches and challenges for European Union funding of tourism companies in Bulgaria*

### INTRODUCTION

Tourism is a factor underlying the development of a number of European regions. This is especially true for underdeveloped regions, due to the significant beneficial impact and potential for job creation, especially for young people. Tourism is also an increasingly important aspect of the lives of European citizens, many of whom travel for personal or professional reasons. Because of its relevance to cultural and natural heritage, as well as to the traditions and modern culture of the European Union, tourism exemplifies the need to reconcile economic growth and sustainable development, including the ethical dimension. Tourism is also an important means of improving the reputation of Europe in the world, of presenting our values and of promoting the European model, which is the result of centuries of cultural exchange, linguistic diversity and creative spirit [1] of various types of tourism, but there are also major problems in the development of different types of tourism.

### EXPOSITION

The main factors that foster the development of Bulgarian tourism are:

- diverse nature;
- proximity to major markets;
- safety;
- a climate favorable to health;
- the rich cultural and historical heritage;

- preserved traditions, customs and folklore;
- hospitable population.

These beneficial factors are a precondition for including the Tourism sector in the portfolio of European Union funding in Bulgaria. The Priority Axis 3 of Operational Program "Regional Development" 2007-2013 namely "Sustainable Development of Tourism" provided funding, which resulted in improving the tourist infrastructure, building new tourist attractions, improving the marketing of tourist sites [2]. A review of the program's implementation and the implementation of the axis show an additional yearly-attracted number of tourists in the supported attractions - 1 179 603 people, 145 tourist attractions or sites developed and 121 tourism development projects were implemented. The number of improved tourist sites and attractions amounts to 31. Toatly 157 mln. Euro were allocated to fulfil the objectives of this program [3].

The other main financial source was the Rural Development Program 2007-2013 of Republic of Bulgaria. Although not funded by the European Structural Funds, the Rural Development Program is also of interest in exploring the opportunities for municipalities to finance projects in the tourism sector. Within the third axis of this program, municipalities developed tourism projects under measure 313 "Improvement of Typical Deficits". The effect of

this program implementation were improvement of basic tourism infrastructure for population of 103 municipalities. The activities supported by the measure include the development or provision of type-specific information,

### **Opportunities to Finance Tourism Development during the Programming Period 2014-2020**

Although tourism is not included as a thematic objective in the European Structural and Investment Funds regulations during the new programming period, the regulations provide a number of opportunities for smart tourism investment. The European Commission's Thematic Guidelines on Tourism Investments published by the Commission have made recommendations for them to be:

- Harmonized with one or more thematic objectives and investment priorities;
- Aligned with the SWOT analysis of the relevant national;
- Focused on better valorisation of cultural and tourist assets;
- A driving force in innovation and diversification of products, processes and services, as well as in market niches in order to overcome dependence on low added value and seasonal employment and to ensure economic activity and jobs outside the tourist season.

Particular attention should be given to tripling the capacity for excellence, innovation and internationalization of SMEs and clusters, (cross-cluster) cluster activities, including by improving internal and external links. As small barriers to market entry are one of the distinctive advantages of the tourism sector, attention should be rendered to supporting entrepreneurship and creating new businesses.

Tourism is closely related to the use and development of natural, historical and cultural assets and the attractiveness of cities and regions as a place to live, work and visit as well as the development, innovation and diversification of products and services that visitors enjoy. Quite naturally, it is precisely the European Regional Development Fund (ERDF) to support the competitiveness, sustainability and quality of tourism at regional and local level.

Referring to the current strategic planning period the Operational Program Regions for Growth 2014-2020 of Bulgaria includes as Investment Priority: Preservation, Conservation, Promotion and Development of Natural and Cultural

Heritage and is funded by EUR 127 mln. It has a priority axis focused on tourism: Priority Axis 6: Regional Tourism. Specific objectives of this priority is increasing the tourist supply of monuments of culture of national and world importance. As beneficiaries are specified Ministry of Culture, religious institutions, municipalities, including in partnership with NGOs, financial instruments [4]. This program is geared to regional development following the Bulgaria 2020 National Development Program. It has a priority axis focused on tourism: Priority Axis 6: Regional Tourism. The results of this axis are expected not only to preserve and develop the cultural heritage but also to improve the competitiveness of Bulgarian tourism. In order to achieve these objectives, activities for the development of cultural heritage sites, development of the tourist infrastructure, adequate training of the staff, etc. are envisaged. Here the funding opportunities are mainly focused on activities such as:

- Development of sites of cultural heritage of national and world importance, incl. religious ones through conservation, restoration, preservation, exposure, socialization, promotion, equipment, introduction of translation techniques and programs, guided tours, etc.

These are supported by vertical planning activities, improvement of adjacent spaces as well as support for the development of tourist products (based on assisted attractions) and market information. The above mentioned include marketing and impact analyzes, regional surveys of visitors, development of marketing and advertising strategies and programs for tourist products, creation of tourist packages and advertising activities – preparation and distribution of information and promotional materials for tourist pro digitization of the relevant object, etc., directly related to the aided attractions and their connection with the surrounding environment.

Another target is development of the tourist infrastructure needed for the attractions (hiking trails and health trails, climbing, riding and cycling trails, picnic areas, signboards, visitors' information centers).

### **Rural Development Program 2014-2020**

The Rural Development Program also provides an opportunity to finance tourism projects in the municipalities. Among the objectives of the program are: increasing the competitiveness of agriculture and the viability of farms, increasing

producers' incomes and ensuring the supply of quality food products; conservation of ecosystems and sustainable management and use of natural resources in agriculture, forestry and food industry; socio-economic development of rural areas, providing new jobs, reducing poverty, social inclusion and a better quality of life.

By sub-measure 7.5. "Investments for public use in recreational infrastructure and tourist infrastructure" the program provides grants for activities including construction, reconstruction, repair, purchase of equipment and furnishing of tourist information centers, visitor centers for presentation and exhibition of local natural and cultural heritage, art and crafts centers for tourist purposes, tourist attractions related to the local natural, cultural and historical heritage and providing services with cognitive or educational purpose, etc.[5].

Another option for municipalities is through the strategies of the so-called Local Action Groups through the local development community-based BOMP approach. BOM is applied within rural areas, fisheries areas and areas with specific characteristics defined in the National Spatial Development Concept.

The same opportunity is provided by the Local Initiative Fisheries Groups with funding from the Maritime and Fisheries Program.

### **Possibilities for Bulgarian tourism product diversification**

In the context of the above mentioned we could assess the following directions of Bulgarian tourism product diversification which would add substantial value to this product:

- Cognitive and event tourism ;
- Recreational tourism;
- Cultural Tourism;
- Healing (balneological) tourism;
- Business tourism (here is also the congress and the fair);
- Sports tourism and trekking tourism,
- Mountain, sea, river tourism, extreme tourism;
- Rural tourism (here are also agricultural tourism and farm tourism);

- Fishing and hunting tourism;
- Ecotourism and hobby-tourism;
- Religious tourism (pilgrimage).

### **CONCLUSION**

The EU funding can be defined as a challenge to Bulgarian tourism sector to use its strengths as well as existing and potential competitive advantages and core competences to bring about the tourism sector competitiveness and enhance Bulgarian economy growth.

This will enhance positioning Bulgaria as a tourist destination in the upper pricing segments of the world tourist market based on higher quality of the offered tourist product bringing about bigger added value. A factor for this is the diversification of tourism product with forms like spa, spa and wellness, historical, archeological, ethnographic, pilgrimage, eco and rural tourism, congress, hunting, golf, wine and gourmet tourism. Proper local organizational structures could be a factor for implementation of regionally differentiated state tourism policy. The sustainable use of tourism natural, cultural and anthropogenic resources would improve the sector image and effectiveness.

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## THE IMPORTANCE OF THE CONCEPTUAL CONTROLLING MODEL IN THE HEALTH AND CARE MANAGEMENT SYSTEMS USING THE MANAGEMENT OF A HOSPITAL AS AN EXAMPLE

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### ABSTRACT

*The present research is devoted to a rather unpopular but at the same time very important problem: how to fundamentally integrate the conceptual controlling model with its basic useful characteristics into the health and care management system. To be more illustrative, the specific microeconomic features of hospital management principles are used as an example. The research is useful for obtaining practical skills about the necessary economic information that various types of health and care management divisions and subdivisions need to receive.*

**Key words:** *conceptual controlling model, health and care management, hospital management, controlling concept, accounting-oriented, action-oriented and management-oriented controlling*

### INTRODUCTION

The conceptual controlling model is based on the balance between the growth and efficiency strategies. This leads to the cross points of interests between the financial components and the strategies. The divisions and subdivisions of the health and care management systems, in their initial stages of development, emphasize on the growth of income [5]. Expenses and efficiency appear to be supplementary factors for such agents from the health and care industry which spends substantial investments in the creation and promotion of new products and services on the existing market, as well as on new markets. A characteristic of the hospitals at further stages of development is that they find a balance between the two strategies.

### EXPOSE

#### 1. The controlling concept

My approach to the investigation of a hospital is to regard it as an element of the health and care industry. In this respect, I conducted the study of the evolution of controlling as a function of the industrial management to derive the concept of controlling in the management system of a hospital [1].

The introduction of controlling as scientific term and practical instrument of the management can be traced back to the beginning of 1920s in

the USA. With the founding of the USA as an independent country, it was necessary to appoint a person to control the revenues and expenses of the federal government budget [12]. This function of the federal budget controller is the prototype of the modern understanding of controlling used as management function in modern industrial companies in the USA and Western Europe. A closer look at the development of controlling as a concept reveals three stages [9].

#### 1.1. Accounting-oriented controlling

The main objectives and tasks of accounting-oriented controlling are related to the financial and accounting activities of an industrial company. As management instrumentation, accounting-oriented controlling facilitates the process of decision-making in the implementation of company plans. This is based on profound financial and accounting analyses of the company activities in the years preceding the reviewed period. The controller's activity in this respect is to analyze the data and forecast the future development of the company on this basis. The basic method used in this planning is extrapolation. [7]

## 1.2. Action-oriented controlling

In the modern dynamic world of business, making forecasts and taking decisions for development of plans on the basis of statistical data for past periods is a questionable task. The dynamic changes of the environment always lead to substantial deviations from the plan. Therefore, a planning mechanism for constant monitoring of changes in the environment and due adaptation of the current plans according to the new changes is required. Such mechanism is the action-oriented controlling. It helps the managers in the incessant monitoring and analyses of the deviations from the planned data to reveal the reasons and take measures to overcome them. Obviously, this controlling is based not only on financial and accounting data but also on data supplied by all company units. Based on the general analysis, the management makes its decisions. [4]

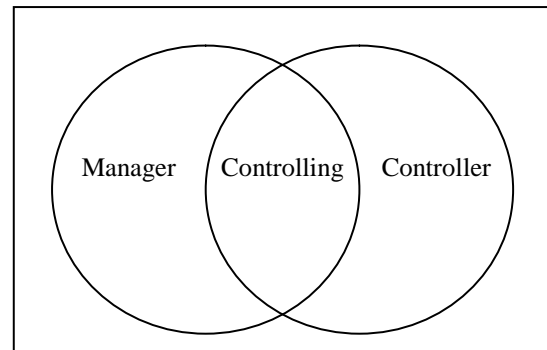
## 1.3. Management oriented controlling

A subsequent development of the action-oriented controlling leads to its transformation into powerful functional instrument for making strategic and operative decisions in all the activities of the company.

The text below will be based on this conceptual thinking. The term comes from the English verb “to control” which implies management rather than control only. In this respect, controlling is regarded here as complex function of hospital management facilitating the process of elaboration and making decisions (strategical, tactical and operative) in all fields of hospital activities.

It is generally assumed that the financial indicators show the result obtained (so-called lagging indicators or final indicators) and this is their disadvantage compared to non-financial ones, which indicate for future results (leading indicator). Of course, this depends on the indicator definition. For instance, the value of a company calculated by the method of discounted free cash flow, depending on calculation method, includes FCF forecast for the next 5 or 10 years. According to its definition, this financial indicator is actually a leading indicator rather than one reflecting the future. [8]

For a better illustration of this function of controlling, we will cite the figurative comparison, produced by the leading researcher in the field of controlling in Germany Dr. Albrecht Deyhle, between the functions of the manager and controller (Fig. 1).



**Fig.1.** Illustrating controlling as a function of the management conception

The controlling activities are affected by a specialized controller but their objective is to help managers in the process of making strategic, tactical and operative decisions in the hospital. The help is in the form of registration of deviations from the plan, analysis of these deviations and provides the manager with instrumentation to overcome them. These instruments can be both methodological and analytical, as derived from the alternative variants. The methodological instruments supply the manager with illustrations and provide methods for the various kinds of calculations, analyses and making decisions. The analytical alternative variants show different ways for decision-making and surmount the deviations, as well as optimal utilization of production factors of the hospital and increase hospital efficiency [3].

Table 1 presents the main characteristics of the different kinds of controlling in a hospital. The characteristics of the different kinds of controlling conceptual models can be shown as it was made in the example in Table 1. The example uses the basic conceptual controlling model characteristics: objectives, tasks and results, according to the three types of controlling models described above [11].

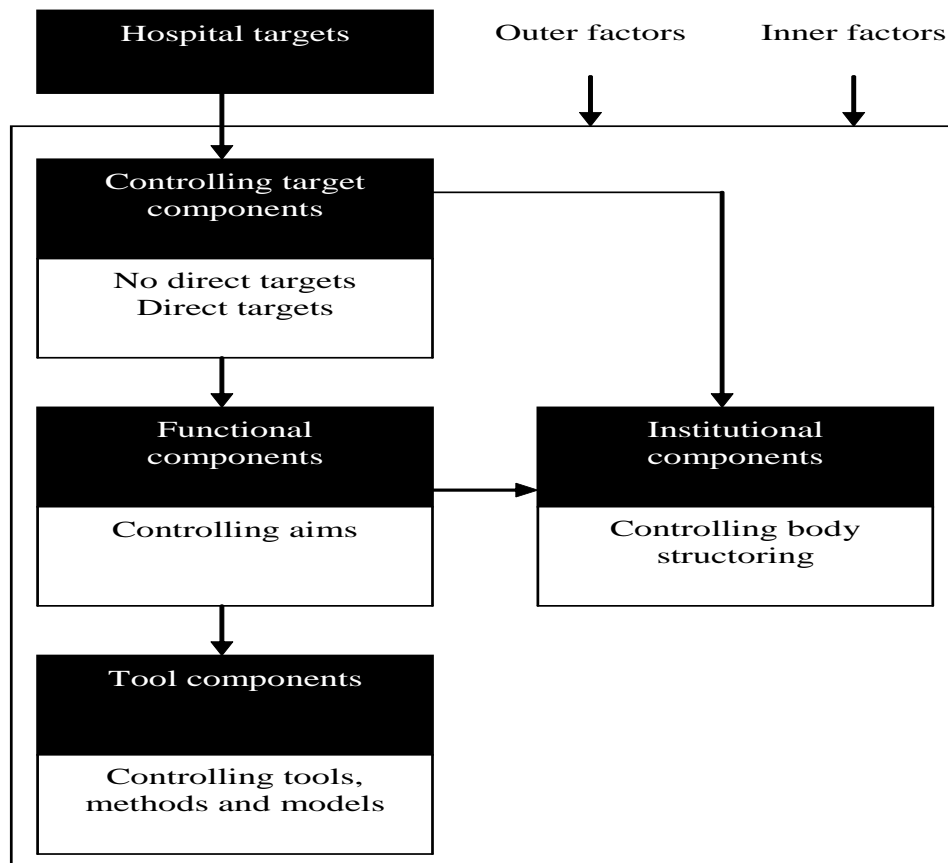


**Table 1.** Characteristics of the different kinds of the controlling conceptual models

Characteristics	Controlling		
	Accounting-oriented	Action-oriented	Management-oriented
Objectives	Improvement of hospital accounting	Registration and analysis of deviations from the plan (control by deviations)	Improvement of decision-making mechanism
Tasks	Accounting analyses	Analysis of the deviations from planned expenses. Analysis of hospital potential and to reveal the weak points and remove them.	Development of planning activities (strategic, tactical and operative planning). Measures for reduction of expenses and increased utilization of potential.
Results	Elaboration of new plans by extrapolating the past.	Plans as means to achieve certain goals.	Adaptive mechanism for decision making.

The present discussion of the concept of controlling as a management function is regarded as a system of objectives, tasks, methods and

models of controlling. The components of a concept for controlling in a hospital will be presented in Figure 2 [12].



**Fig.2.** Components of a controlling conceptual model as a functional instrument of the hospital management

As can be seen from Figure 2, a detailed study of the individual components is required to build an overall controlling concept:

- Controlling objectives;
- Controlling tasks;
- Technical means and instruments of controlling;
- Organization and position of controlling in hospital structure.

## 2. Objectives and tasks of the controlling conceptual model

### 2.1. Objectives of controlling

It can be seen from Fig.2 that the objectives of the controlling are:

- direct;
- indirect.

The indirect controlling objectives are derived from hospital objectives and they are oriented to co-ordination of the overall activities of the hospital to achieve the ultimate goal. The following forms of co-ordination can be distinguished: [6]

- co-ordination by self-adaptation;
- co-ordination by instructions, directives, orders;
- co-ordination by rules, programs and plans.

**Co-ordination by self-adaptation** means that the personnel maintain the proportions and

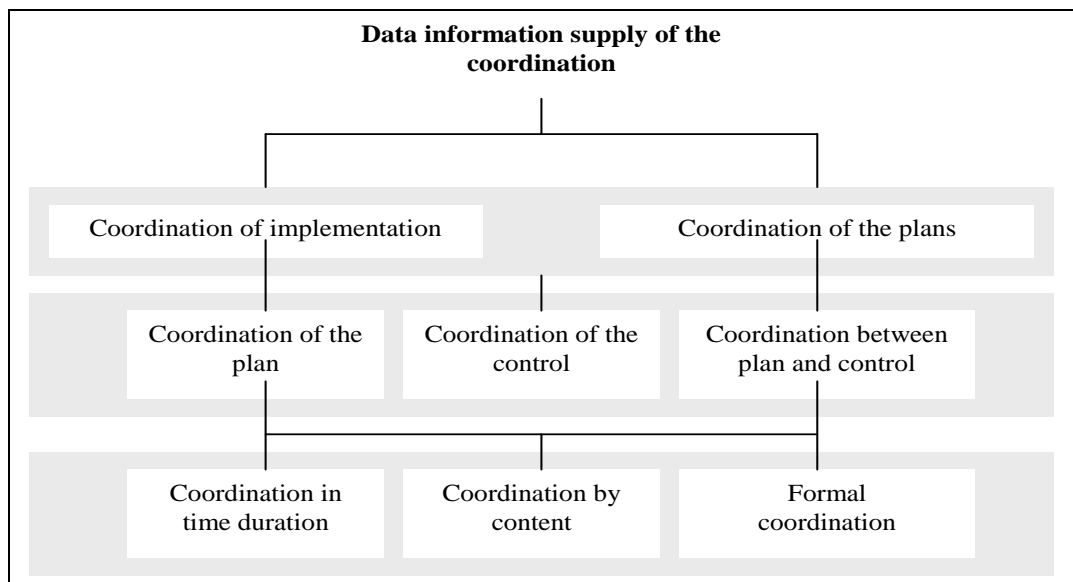
relations created in the hospital through its organization.

**Co-ordination by personal directives** and orders reflects the hierarchical relationships in the hospital. Using orders, directives and instructions, the health managers maintain the proportions and relationships between the elements of the healthcare system in the hospital.

**With co-ordination by rules, programs and plans**, the planned proportions and relationships are maintained. In case of a divergence from them, additional regulation resources are introduced to restore the proportions and the realization of the programs and plans.

The main direct objective of the controlling in a hospital firm is to monitor the actual situation of fulfilment of plans for the different planning periods (strategical, tactical, operative), analyze the divergences from the planned data registered and elaborate alternatives to restore the planned proportions and relationships [2].

The assessment of the alternative variants and decision-making, however, is performed by the managers. The role of controlling here is to prepare all the information necessary and visualize the process of co-ordination. Thus, a substantial goal of the controlling is to collect process data and deliver the necessary information to the managers for the purposes of co-ordination.



**Fig. 3.** Types of co-ordination and provision of the necessary information

Figure 3 shows the relations between the different types of co-ordinations and required information. It can be seen that the controlling should provide timely, reliable and

understandable information which would be helpful in the analyses of the planned and reported data for the estimation of:

- formal co-ordination;

- co-ordination by contents;
- co-ordination in time.

The estimation would provide opportunities to the hospital management to make well grounded decisions to compensate for the deviations from the plans and would facilitate the realization of the objectives [10].

**Co-ordination in time** means to analyze and maintain the proportions and relationships between the strategic, tactical and operative plans.

**Co-ordination by content** specifies the objects and parameters which should be maintained.

**Formal co-ordination** aims to maintain the proportions and relationships within the formal structure, i.e. among the different kinds of regulating methodological documentation used to elaborate, carry out, account for and co-ordinate the plans in the hospital. Practically, it means co-ordination between all the assistants working on the documentation which will be the basis of the strategic planning in the aspect discussed. Therefore, the co-ordination of hospital activities requires health managers and hospital medical staff executing the necessary health care to create and maintain proportions between goals (desires of health managers and society as a whole) and the abilities of the hospital itself, between strategies, policies and operation management, etc., according to the logic of strategic management for the realization of the goals set for the hospital.

The indirect purposes of controlling are intended to create conditions for the realization of the aims connected with the health care efficiency. Obviously, the word is about the economic aims of the hospital in addition to the basic medical aims, which are set as indirect aims of controlling. It means that controlling with its instrumentation and data visualization should provide the health managers such conditions, terms and norms to take strategic, tactic or operative decisions which will facilitate the achievement of the medical purposes at minimized hospital costs and high quality of health service. The economic aims, however, should not be regarded as primary ones. It should be noted here that the economic aims could be achieved only if all the conditions and prerequisites for the proper performance of medical staff creativity are ensured, i.e. if the social purposes are realized. Without fulfilment of the medical aims, however, it is impossible to consider achieved neither the social, nor the

economic aims. Therefore, the system of hospital aims can be classified as one of the indirect aims of controlling as far as the controlling is functional instrumentation of the management for the decision making process. All the management decisions are meant to create conditions and prerequisites for the realization of the hospital aim system. The realization of controlling aims requires the execution of controlling tasks.

The study of the management of hospitals as companies in our country is carried out under the Law and started practically from the beginning of 2000, when radical healthcare reforms were initiated. It should be noted that the discussion on the appropriateness of these reforms is going on at all levels of healthcare administration in this country.

## CONCLUSION

In conclusion, I should say that the direction of the healthcare reforms and the implementation of controlling as an active management mechanism, first for control of expenses and next, as an adaptive mechanism for elaboration, taking and realization of decisions adequate for the market and the available capacity of our healthcare system, will help for the improvement of the quality and efficiency of health services in our country.

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## HEALTH INEQUALITIES IN BULGARIA IN THE 21st CENTURY

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### ABSTRACT

*Health inequalities are inequalities in access to the health system, adequate health care, and overall health care gaps due to ethnic, racial, cultural, age, gender and socio-economic status. Historical evidence suggests that health inequalities have been "found" in the 19th century, and that socio-economic inequalities in health care are not a new phenomenon. It is believed that health inequalities were simply unrecognized due to lack of information. Health inequalities are defined by the U.S. Administration organization of health resources and services as "dependent population differences in disease, health outcomes and consequences or access to health care.*

**Key words:** *Health inequalities, health determinants, health status, population, health care, health system,*

### INTRODUCTION

Health inequalities and inequalities in health care are one of the most important modern issues of health systems and societies across Europe. They are reflected in the priorities of the European Commission. Apart from Europe, the reduction of health inequalities is also considered as a priority by the World Health Organization (WHO). In Bulgaria, the principles of equal treatment and the provision of accessible medical care have been taken as leaders in the construction of the national health system and the compulsory health insurance system. A Communication of the Commission of the European Communities on reducing health inequalities in the European Union (EU) concludes that it is overwhelming and can be removed through public policy actions. In this connection, the policy of resource allocation in the health system is extremely important. It is unavoidable that it be tailored to health needs and medical care needs, and to some extent, the health inequalities of the population can also be overcome. There is no comprehensive research in Bulgaria on the relationship between the health status of the population and the socio-economic factors on the one hand and the differences in health and the health system imperfections on the other. However, despite the lack of sufficient research on the issue, there is evidence that the differences in health status and access to

healthcare services in Bulgaria have increased in recent years. [1]

### REPORT/EXPOSE/ RESULTS AND DISCUSSION

In relation to the purpose and the tasks of this report, we analyze the differences that are observed among groups of the population, broken down by gender, type of the settlement (town, village) and region (the districts of the country). Given the available statistical information, health is represented by three of the most commonly used indicators - life expectancy, mortality (general and underlying causes) and infant mortality. Morbidity is only used as a complementary indicator.

Based on the analysis of the above mentioned data, the following conclusions can be drawn:

- the analysis of the main health indicators of the nation demonstrates the existence of significant inequalities between different groups of the country's population;
- the largest inequalities are observed between the districts in Bulgaria, as well as between the urban and rural populations. Concerning the indicators under consideration, significant differences were found in child mortality, with variations reaching up to several times between regions with the highest and lowest values;

- if some inequalities in the life expectancy can be explained by biological and genetic features (such as those between men and women), and some of the differences in overall mortality can be attributed to the age structure and demographic aging of the population (especially in villages, as well as in some areas of the country), the inequalities in child mortality are mainly due to the socio-economic determinants of health. The latter are related to living conditions and lifestyles, the economic development of the regions as well as access to health services and can therefore be seen as an example of inequality. [2]

2. On the basis of the analysis of the different documents and data a characteristic of equal access to health services in Bulgaria is made and we can draw the following conclusions:

- in Bulgaria there are no conditions for the exercise of the right of access and the right to free choice, and in many cases legislative and regulatory acts, the National Framework Contract or decisions of the NHIF are contrary to the principle of equal treatment regulated by the Bulgarian health legislation;

- In the past 20 years, problems with access to health services have remained unresolved, and some have worsened. In all three health strategies, one of the main strategic goals is to provide affordable and quality health care, but the measures and activities actually implemented to achieve this goal have so far not improved access to health services for the population;

- the vague methodology under which the National Health Map has been developed, casts doubt on its ability to serve as a real tool for the distribution of resources in the health system, according to the needs of the population;

- the health care financing system is not based on the principles of solidarity and equality; the financial burden is increasingly shifting towards households and individuals, which creates serious difficulties in accessing healthcare.

3. There are differences in access to the healthcare network, depending both on domicile and income, which are an example of health inequalities. They confirm the thesis that the "construction" of the regional health network depends on the access of the population to medical care, which in turn is a prerequisite for reducing or exacerbating inequalities

As a result of the analyzes carried out on the distribution of resources between the planning regions and the districts in Bulgaria, the following conclusions can be drawn:

- between the regions in Bulgaria the resources are distributed unevenly. This is largely due to the distribution of medical facilities on the territory of the country. Irregularity is found in all kinds of resources, but the most significant are the differences in human and especially in specialized medical care;

- regional imbalances are due to a number of reasons. To some extent, they are historically conditioned and linked to the extensive development of the system until the early 1990s. The lack of substantial changes in hospital structures, as well as the lack of a targeted and coherent resource allocation policy, according to needs, exacerbate the inherited imbalances. Last but not least, the attractiveness of the individual planning regions and areas for medical professionals is determined by the opportunities for training, specialization and upgrading of the qualification. Regardless of the reasons, the existence of regional imbalances in the distribution of health system resources leads to differences in access to health services;

- regional imbalances will always exist as it is not possible to completely separate (or even) resources (especially those related to specialized pre-hospital and mainly hospital-based medical care) between different geographical and administrative regions and districts. However, the concentration of medical establishments and medical specialists in some regions and the lack of such in others are the cause of the inequality of the population in terms of the possibilities of using medical care. [2]

4. The statistical checks carried out confirm the working hypotheses formulated and prove that there are significant differences in the access to health services between the different types of settlements, which are due to specific obstacles to the use of medical care, differing according to both the domicile of the respondents and their income. From the statistical checks carried out on the hypotheses formulated, we can draw the following conclusions:

- in terms of access to primary care there are significant differences between cities and villages. Access to specialized outpatient and hospital medical care differs in the different types of settlements - district towns, small towns and villages;

- there are no significant differences in the use of medical care (with the exception of dental services) in different types of settlements. Significant differences are found in the use of

health services by people with the lowest and the highest earners. [3]

5. Based on the analyzes of the inequalities in the health status of the population, the financial equivalence, the health policy and the distribution of resources among the regions (districts) in the country, conclusions are drawn regarding:

- the key points in the distribution of resources in the health system and the possibility of reducing inequalities in healthcare through fairer distribution;
- the existence of significant inequalities between different groups of the population of the country, as these are mainly observed between the districts in Bulgaria as well as between the inhabitants of the towns and villages;
- the discrepancy between different normative documents concerning the equality in healthcare;
- the distribution of resources among the districts in Bulgaria, which indicates the existence of significant regional disproportions;
- Access to medical care and the availability of different barriers to it, depending both on the place of residence and on the income of respondents, which are examples of health inequalities;
- the link between health inequalities, health inequalities and the distribution of resources in the health system.

### CONCLUSION

Health inequalities are not just a matter of chance but highly influenced by the targeted actions of people, governments, stakeholders and communities, and they are not unavoidable. Action to reduce health inequalities means tackling the factors that affect the health of the population equally in a way that can be avoided

and can be overcome by public policy. As a result, people with lower socio-economic positions not only live shorter but also spend more years in poor health. Over the last decade, great progress has been made in identifying determinants of health inequalities. A number of studies have shown that health inequalities are due, on the one hand, to the direct impact of poor socio-economic status. On the other hand, low socio-economic groups are exposed to a wide range of adverse physical, psychosocial and behavioral risk factors. In Bulgaria, the issue of inequality is underestimated in theoretical and practical terms. Identifying inequalities at national and regional level would contribute to adequate health policy decisions, and to place them as topics in health professionals' education programs for personalized and equitable care for patients.

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## STUDY OF THE RESULTS OF AN OWN PHYSICAL THERAPY PROGRAM FOR IMPACT ON STRESS RESPONSE

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### ABSTRACT

*The study of the parasympathetic and sympathetic nervous system gives us the possibility to use target oriented therapy approaches. The physical therapy disposes with numerous with relaxing impact. The healing massage finds its indisputable effect in reducing stress. Combining it with muscular stretching results in their relaxation. Our own physical therapy program are integrated Ayurveda and yoga practice. The physical therapy program we applied shows reduction of heart beat rhythm and respiration frequency.*

**Key words:** stress, nervous system, therapeutic approaches, complex approach

### INTRODUCTION

Internal organs functions are realized according to the influence of an autonomous nervous system (ANS). It is called autonomous, because it does not depend on our will, it works independently without direct participation of our conscience.

The sympathetic nervous system (SNS) has a leading role in stressful situations like “Fight or run”. Its role is to prepare the body for its response to an eventual attack. The person is aggressive and excited. Stress hormones are produced, the hearth beat rhythm frequency is increased, blood is redirected to the active skeleton muscles, and the internal organs vessels and the intestines contract and the gastrointestinal tract functions are suppressed.

Stress influences the following axe hypothalamus – pituitary – adrenal glands, which start produce huge quantities of adrenaline and corticosteroids. These hormones help the adequate response in stressful situations, but their constant high levels lead to a number of undesired consequences like cardiovascular diseases, insomnia, osteoporosis, impaired immune response.

The main tool of the PSNS is vagus nerve, the wandering nerve. Its cores are located in the elongated brain. They send their branches, situated deeply in the tissues, to the internal organs, thanks to which they manage their function. Some of these nerve branches are

situated in structures, located on the body surface or in areas which can be easily influenced.

By observing the world, rishis found that life expectancy depends on the number of respirations. Animals that breath quickly live a short life, and those who breath slowly – live longer.

The vagus stimulation is the focus of many different kinds of yoga practice. Here are the places where the wandering nerve can be easily accessed and influenced (1):

- Behind the eyeballs (radix oculomotoria)
- In the auditory passage and the earlobe (ramus auricularis- fig.№1)
- In the muscle contracting the throat (rami pharyngei)
- In the hard and soft palates (nervus palatinus)
- In tongue (ramus lingualis)
- In front neck (Sinelnikov 1983: 156)

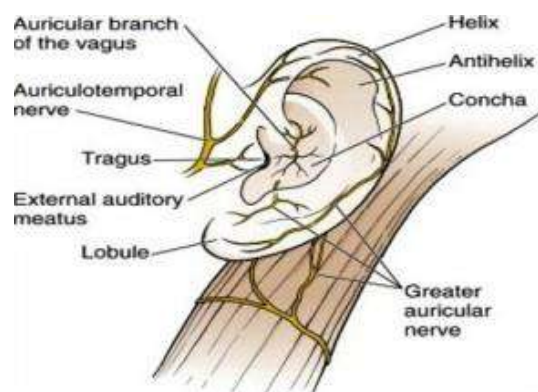


fig.№1 Localization of n. vagus inside the earlobe



It should be always taken into consideration, that the influence on the PSNS should not last too long because there is a number of proofs for diseases appeared as result of long yoga practice. In a healthy human body exists an invisible balance in every single system. PSNS and SNS as parts of the ANS, are responsible for the mental health and work together in balance without prevailing of any of them.

Psychophysiological (psychogenic, neurotic) dizziness – patients with mental diseases often report a dizziness. They usually describe their symptoms like “I feel like swimming, like something is swinging me”, they experience the feeling of imbalance. This psychophysiological dizziness can be constant or temporary attacks but it is always associated with anxiety symptoms. (2).

The physical therapist needs to examine the patient and to select convenient means for impact depending on the individual needs. The following means are used:

- Passive exercises, neck massage,
- Fortifying exercises for all groups of muscles,
- Respiratory muscles,
- Coordination and balance exercises,
- Games with no competitive character,
- Relaxation exercises, cycles of exercises, etc. (3).

Every human being in stressful situation experiences not only pressure of the Central Nervous System but also muscle pain, particularly tense neck and shoulder girdle muscles – descending fibers of m. trapezius, m. levator scapulae, m. pectoralis major etc. I would say that the descending fibers of m. trapezius reflect the mental state of every individual (4).

According to the representatives of the traditional eastern medicine nerves are the signaling means of the human body. They send messages to all body parts and connect them with the commanding center in the human brain. In case of nerves problem, it usually a matter of problems of perceptions of this particular person for the environment, and his communication with other people.

For such person it is necessary to think over his life, and try to find the roof, the moment when these emotions appeared for the first time in his life. He needs to reset his thoughts and emotions in order to make new things happen, this way a number of positive changes will

appear, he needs to realize that he is ready to accept them. (5).

We find, that the roof of every stress is surely hidden in a particular situation caused by his social communication, some negative various emotions and fears experienced in the past. Looking back, the patient is able to redirect the situations generating stress, thanks to a specialist, and to look for the reason for his thoughts to escalate into nervous tension.

A number of recommendations are given, to apply herbal extracts such as passionflower, St. John’s wort and Baikal skullcap whose medical effect has been largely studied, but each of them has its contraindications, which makes the consultation with a specialist before their use – obligatory.

#### **Scheme of own physical therapy program for Stress response**

PROCEDURE PARTS	CONTENTS	DOSAGE	METHODOLOGICAL INSTRUCTIONS	PURPOSE
PREPARATORY	Self-massage (Neck massage). Dynamic and static respiratory exercises.	5-10 min.  2-4 min.	Complex stimulation of selected access zones of n.vagus	Respiratory frequency reduction and muscle relaxation.
BASIC	Cyclic and balance exercises.	5-7 min.	The patient should not think of anything while walking.	Aerobic endurance increase.
CLOSING	Relaxing exercises. Stretching of m. levator scapulae, m. trapezius pars descendens, pectora	2-4 min.	Teaching the patient in performing correctly the stretching for a minimum period of 30 seconds.	Muscle relaxation and psycho-emotional state improvement.

	lis major. Autohy pnosis.			
Total duration: 14-25 minutes				

### EXPERIMENT

The process of examination and measuring the herat beat rhythm (HBR) was relalized by palpation (palpatio). We used easily accessible arterias with a suitable location, which can be pressed on a hard base /a bone/. The examination of *a.radialis* was held.

We used the following levels of increase of HBR as an examination method of the emotional tension (6):

1. Heart beat frequency increase up to 12 beats per minute.
2. Heart beat frequency increase from 13 to 18 beats per minute.
3. Heart beat frequency increase from 19 to 24 beats per minute.
4. Heart beat frequency increase from 25 to 32 beats per minute.

5. Heart beat frequency increase from over 32 beats per minute.

Measuring the number of inspiration per minute. We carried out a number of examinations in lying position, the patient spends at least 5 minutes lying before these procedures. We put an object in the epigastric area and we controlled the frequency of breathing afterwards. We applied our own physical therapy program for decreasing the stress of healthy individuals on people among our closest friends who have stress factors in their families and working environment. We examined 24 individuals, 15 women and 9 men. Initially we recorded the data about their heart beat rhythm frequency and breathing frequency. In 60 % of the cases – we registered a 1<sup>st</sup> level increase of the HBR, 30 % demonstrated normal values and in only 10 % of them we found bradycardia (fig.№2). We instructed the individuals with an increased HBR how to perform a complex physical therapy program for reducing the stress in the month of September 2017. After two or three instructional and educational procedures, they continued exercising at home for a two weeks' period.

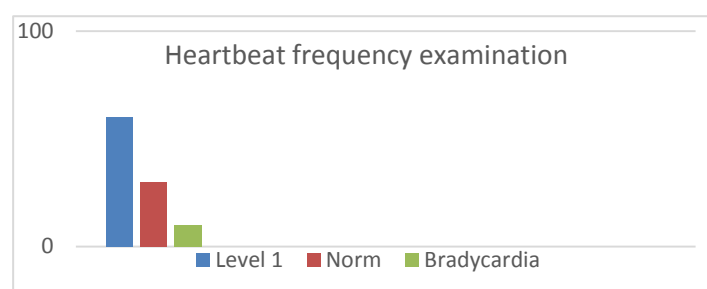


fig.№2 Heartbeat frequency examination beats per minute before the procedures

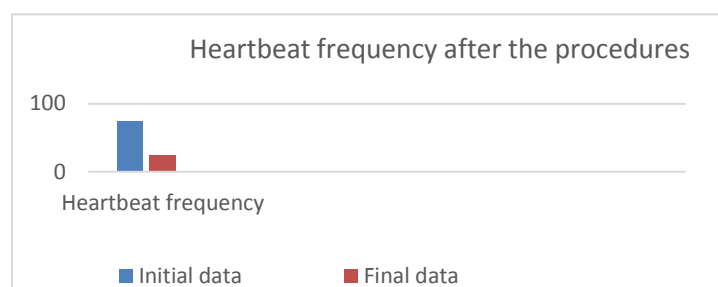
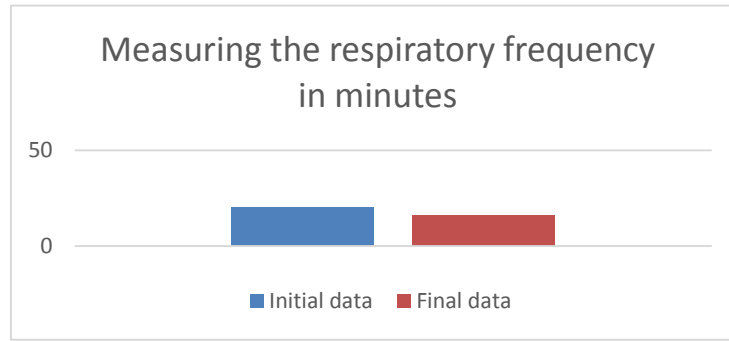


Fig.№3 Heartbeat frequency examination beats per minute after the procedures



**Fig.№4** Measuring the respiratory frequency in minute after the physical therapy program

## RESULTS AND DISCUSSION

The results we received are as follows: we contacted the examined individuals and we could examine again 14 people of the whole group, only 10 of them followed and respected daily the physical therapy program. The result we found was a heartbeat frequency reduction in 75% of all examined individuals (fig.№3) who respected regularly all therapy recommendations. Respiratory frequency has been also decreased by an average result of 20% (fig.№4).

We consider that during our future examinations, due to the reduction of the number of people in the experiment group, needs to be included a program developed by us, in order to motivate individuals and to increase their number.

We consider it necessary to carry out a more complex examination with the purpose to make a more precise and subjective stress evaluation.

During our future study we need to form a multidisciplinary team engaged with the complex examination of stress problems.

The reported results show uncontestable positive impact on the medical indicators

examined by us. This will surely result in decreasing the levels of stress.

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## SPA PROCEDURES – MEANS OF STRESS PREVENTION

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### ABSTRACT

*Nowadays, in our dynamic and hectic life people consider stress as something typical. Together with the development of civilization the impact of stress on our bodies gets more and more serious. The purpose of this research is to study the role of the SPA procedures in influencing stress among customers of this kind of services.*

**Key words:** SPA procedures, stress, prevention

### INTRODUCTION

Stress is a constant part of our life. Stress is a state of total mobilization of the body, caused by strong psychic and physical irritants. It represents the response to untypical, surprising situations and tension. [2] Nowadays, in our dynamic and hectic life people consider stress as something typical. Together with the development of civilization the impact of stress on our bodies gets more and more serious. Factors of different nature can lead to physical and mental pressure, social alienation, states of stress and anxiety. The main reasons for stress and critical states of personality become more and more multiple and various in nature. Our hectic, stressful life style needs more attention and responsibility to our physical and mental health. The key factors essential for the elimination of stress are: healthy diet (the right combination of healthy food, herbs, water consumption), a healthy lifestyle including physical exercises, relaxation, positive thinking, SPA procedures etc. The relaxation practice is oriented to healthy people in order to provide prophylaxis, relaxation, stress elimination and complete rest. In all European countries SPA procedures contribute to “lifestyle quality improvement for European citizens” (EU Charter of Fundamental rights 2007) [1]

### EXPERIMENT

The purpose of this study is to evaluate the relaxing SPA procedures impact on the stress

response amongst customers of this kind of services.

In this connection we carried out a study on the territory of „Grand Hotel § SPA Primoretz” и „Atlantis Resort § SPA “with 96 participants at the age between 28 and 58 (37 -38,5% - of them are men and or 59 -61,5% - women). All individuals who took part in the research felt mental pressure and social alienation (stressful situation), in order to overcome them we applied relaxing SPA procedures – classical massage and hydro massage. In order to control the impact of the SPA procedures we used an evaluation test of the psycho-emotional state (depression scale of Von Zerssen) [4]. The dynamic of the mental state of the examined individuals and the impact of the SPA procedures after that, is measured by the total number of points differentiated in five separate groups: I - from 0 to 6 points (hyperthymia); II - from 7 to 16 points (normothymia); III – from 17 to 26 points (depressive response); IV – from 27 to 41 points (neurotic depression); V - from 42 to 56 points (expressed depression).

### RESULTS AND DISUSSION

Figure 1 describes the results [3] of the jobs analysis of the respondents, according to which:

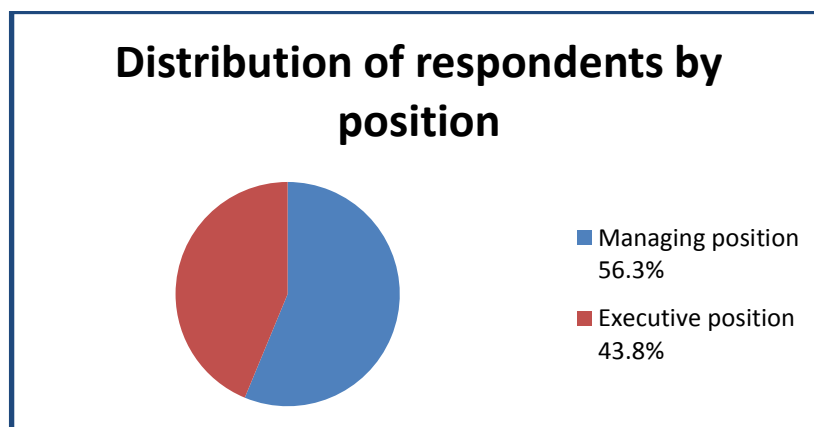
- The biggest part (11 people or 11,5%) have their own business, followed by those with law practice (10 people or 10,4%),

- A small group of people are representatives of different jobs,
- The number of unemployed people is the smallest (7 people or 7.3 %)

**Table 1.** Distribution of the participants in the survey by professions

Distribution of the participants in the survey by professions in%			
Accountant	9.4%	Teacher	5.2%
Architect	4.2%	Merchant	6.3%
Unemployed	7.3%	Sales Consultant	9.4%
Student	4.2%	Engineer	4.2%
Hostess	6.3%	Doctor	6.3%
Own business	11.5%	Broker	7.3%
Painter	2.1%	Lawyer	10.4%

A little more than the half of the tested people (56,3%) occupy managing positions and the rest of them 43,8% - are executives (fig. 1).



**Fig.1** Distribution of respondents by position

The changes in the mental state (by groups) of the examined individuals resulting from the procedures we applied, are presented in Table 2. The data we received shows what follows:

- Immediately before the procedures the respondents were classified in 3 categories– III group –concern with a developing depression 25,0 %, IV group – neurotic depression -60,4% and V group – expressed depression -14,6%.

- After the procedures, only one participant stayed in group IV – neurotic depression. All the rest migrated to group I – hyperthymia – 27,1 % and II –normothymia - 71,9%. The state of hyperthymia is characterized by an unusual excitement and hyperactivity. Group II prevails – normothymia (71,9%). This state is characterized by normal mood and activity (lack of depression).

**Table № 2.** Distribution of participants by mental groups in %

	Before procedures	After procedures
<b>I group</b>	0	27.1%
<b>II group</b>	0	71,9%
<b>III group</b>	25%	0
<b>IV group</b>	60.4%	1%
<b>V group</b>	14.6%	0

Dynamic of mental groups (table №3) shows the following facts:

- From group III before the procedures (concern with developing depression) 45,8% migrated to group I (hyperthymia) and 54,2 % - to group II (normothymia);
- From group IV before the procedures (neurotic depression) the bigger part –

74,1% migrated to group II (normothymia), and the rest - 25,9 % to group I (hyperthymia);

- From participants in group V (expressed depression) 92,9% migrated to group II (normothymia) and only one person - 7,1% to group IV (neurotic depression).

**Table № 3.** Dynamic of the groups before and immediately after the procedures

Group before the procedures		Group after the procedures			Total
		I	II	IV	
III group	Number	11	13	0	24
	%	45,8%	54,2%	0,0%	
IV group	Number	15	43	0	58
	%	25,9%	74,1%	0	
V group	Number	0	13	1	14
	%	0,0%	92,9%	7,1%	
Total	Number	26	69	1	96
	%	27,1%	71,9%	1,0%	

**III Group – concern with a developing depressive response**

**IV Group – neurotic depression**

**V Group – expressed depression**

Basing on the results we received and according to the research we carried out, we can conclude what follows:

- The most common negative responses (giving 2 points) before the procedures are: tired, tense, anxious, nervous, hesitating, internally unbalanced, exhausted and miserable. Before the procedures the most frequent positive answers (giving 0 points) are capable, patient, useful, superior, complete, responsible and sociable;

- After the procedures, the number of participants with positive emotions increased, most people report: good mood, calm, useful, better than others, complete, successful, capable. The negative emotions which prevail are: no appetite, hesitating, indifferent, shy, exhausted, incomplete and incapable.

The conclusions resulting from the researches we carried out and the data analysis are the following:

- The applied SPA procedures helped to overcome stress and all accompanying negative emotions in the examined individuals. The results in Table № 2 present the clear information that most of these people migrated in group II – normal state of mind and activity.

- All people occupying managing positions are exposed to a higher psychological pressure, which is controlled by the relaxing SPA procedures, in comparison with those working as executives. The logical conclusion is that the job position we have influence our emotions as well as the impact of the activities we used and applied.

Considering the importance of the SPA methods as an alternative of the social and professional stress, we can recommend their application at least once a week or a combination with other techniques – reyki, yoga, meditation, aqua activities etc, in order to achieve more intensive and long-lasting results [3].

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## THE PHYSICAL FACTORS IN THE REHABILITATION OF PATIENTS WITH METABOLIC SYNDROME

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### ABSTRACT

*The objective of this paper is to share our experience in the prevention and treatment of the metabolic syndrome. The most important risk factors for its development are abdominal obesity (essential component) and insulin resistance. The metabolic syndrome is a multicomponent cardiovascular risk factor. There are two main directions in the treatment of metabolic syndrome – modification of the main reasons: treatment of the excessive weight and obesity; hypodynamia treatment; insulin resistance treatment. We have applied a non-medication approach which includes the removal of various stress conditions, body weight control, giving up alcohol and smoking, application of a hypocaloric diet. Early prophylaxis is needed, including a change of lifestyle and adequate and complex influence on each one of the syndrome components. The means of physical medicine and rehabilitation are widely accessible and relatively cheap. They can be applied through self-control and training of the patients themselves. They are applied also in non-hospital conditions; they affect the social status, as well as the psycho-emotional stress. We recommend kinesitherapeutic methods with diabetic polyneuropathy and obesity – a moderate physical load of purposeful exercises for each of the disturbances, which continue at home, and with the patients having arterial hypertension and obesity – for the rest of their life. The active kinesitherapy is an initiating procedure in the integrated program approach, which includes also hydrotherapy (underwater-jet massage) and a well balanced diet. The appropriate nutrition regime, increased physical activity and new lifestyle help patients with metabolic syndrome therapeutic achieve a success without a medication treatment. Active kinesitherapy is part of the curative strategy of the metabolic syndrome treatment; however, if applied independently it cannot solve all cardinal manifestations of the syndrome. Having in mind the beneficial changes in the patients' general status ensuing from it, we propose to establish it as a first choice therapeutic approach for patients with increased metabolic risk.*

**Key words:** metabolic syndrome, kinesitherapy, diabetic polyneuropathy, obesity, hydrotherapy.

### INTRODUCTION

The beneficial effect of the kinesitherapy on the metabolic syndrome is probably achieved through various mechanisms. A number of studies (Adersen H., Gadeberg P., Brock B. et al., 1997; Schneider S., L.F. Khachadurian 1984) show that exercises with moderate intensity and longer duration (30-60 minutes) favour the utilization of the energetic substrates. Such behaviour improves the three-phase process of better utilization of the muscle glycogen, the glucose in the blood and the free fatty acids (FFA). Well-known is the fact that upon motion activity in the first 5-10 minutes the glycogen in the muscles and the glucose in the blood are the main energy source, at further longer load (10-40 minutes) the peak stage of utilization of the glucose in the

tissues starts running with following up inclusion of FFA (up to 70%) (Koev D., Lozanov B., 2000). This motivates the necessity of applying a 40-60 minutes motion programme for beneficial effect on the metabolic status. The metabolic dysfunction in sugar diabetes type 2 is mainly related to disorders of the carbohydrate and the lipid exchange. The reduced resistance of the peripheral tissues to the biological effect of insulin and/or the disturbed insulin secretion lead to glucose intolerance. The presence of obesity in over 80% of the ill enhances these two pathogenic mechanisms and it is associated with the presence of dyslipoproteinemia (hypertriglyceridemia, low HDL – cholesterol, high values of the total cholesterol and LDL-cholesterol) (Koev D., Lozanov B., 2000). The most important changes in the peripheral nerves of diabetics are provoked



by hyperglycemia (Under R., Foster D.W.1992; Pirart J., 1978). Dyslipidemia worsens the glucose tolerance, on the one hand, but at the same time it causes microvascular disorders in the peripheral nerves (Ward J. D. 1994; Thomas P.K. 1995). The penetration of cholesterol in the endothelium of the vessels leads to hypoxia and is predetermined by the damage of the vessels walls and increased level of cholesterol in the blood. The high level of HDL-cholesterol is a protective factor for the vessel genesis, because it takes up the cholesterol from the vessels and the tissues to the liver for elimination via the bile, while the low density lipoproteins (LDL-cholesterol) transfer the cholesterol for deposition in the vessels (Angelov I., 2004). Type 2 sugar diabetes, characteristic for the mature age, starts usually slowly, evolves gradually and is often discovered at prophylactic examinations. The treatment is complex and includes diet, motion regime and medications. The diet is necessary for all patients, notwithstanding the gravness and the phase of the disease. The treatment of type 2 sugar diabetes almost always starts with only a diet. If there is no effect, peroral antidiabetic medications are administered. After a period of such treatment of various duration, exhaustion of the pancreas secretory abilities can occur, which imposes transition to insulin (Koev, D., 2000). A number of authors (Hristov, B., 2003; Neykova, M., 1991; Koleva, I., 2003) share the opinion that patients with diabetic polyneuropathy (especially those of middle and more advanced age) should change their ways of life towards a systematic moderate physical load and maintenance of a certain physical condition. The high level of habitual physical activity reduces the insulin resistance of the tissues (especially the skeleton muscles); protects against obesity; reduces the excessive weight, which is related to lower plasma levels of LDL-cholesterol and triglycerides and higher plasma levels of HDL-cholesterol, as well as lower blood pressure values (Damyanova, M., 2000; Koev, D., 2000; Yoshinov, R., 2002). It was scientifically ascertained that the application of kinesitherapeutic methods leads to changes related to the glucose: reduction of blood-sugar level, improvement of glucose assimilation in the tissues, stimulation of glucose synthesis in the liver, increase of cell sensibility to insulin (Angelov, I., 2004; Gabriel, K., Schindler, K., Haber, P., 2003). The motion activity enhances the oxidizing processes and the lipolysis, which is used in the combat against the metabolic syndrome of diabetics (Koev, D.,

Lozanov., B., 2000; Angelov, I., 2004). Physical activity increases sharply the use of glucose in the peripheral tissues, since it is the main energy source and increases the number of the insulin receptors (Koev, D., Lozanov., B., 2000; Terjung, R., 2000). Therefore, we have applied a specialized kinesitherapeutic programme, where the daily kinesitherapeutic method has a duration of 40 minutes and a moderate intensity of the load. In the introductive part, the exercises are focused on the preparation of the body for further load by gradual adaptation of the cardio-vascular system (chest and diaphragm respiration, rhythmic exercises for the distal groups of muscles, isometric exercises in circulatory regime). In their basic part, the kinesitherapeutic means are aimed to increase the muscle power (through exercises against dosed resistance set by elastic Tera-Bands), improvement of the sensory, coordination and balance ability of the patients (through purposeful exercises for each disorder) and increase the adaptation capabilities of the cardio-vascular system of bigger load (by cyclic exercises and bicycle ergometry load). The conclusive part of the complex includes autogenic training for general relaxation of the patients. The patients have been instructed to continue the performance of the kinesitherapeutic programme at home under instructions given in advance.

Early prophylaxis is necessary through a change of lifestyle and adequate complex influence on each of the syndrome complexes. The physical therapy means are widely accessible and comparatively cheap. They can be applied by self-control and training by the patient themselves. They also have application in out-of-hospital conditions. They affect the social status of the patients, as well as the psycho-emotional stress. There are two basic approaches in the treatment of metabolic syndrome:

- modification of the main reasons:
- treatment of excessive weight and obesity;
- treatment of hypodynamia;
- treatment of insulin resistance;

The approaches to the metabolic syndrome treatment are:

Non-medication approach: elimination of the various stress conditions, body weight control, abstention from alcohol and tobacco smoking.

Use of hypocaloric diet containing big quantities of polyunsaturated fatty acids and fibers. Foods rich of cholesterol are excluded, limited table salt use, use of foods with low glycemic index, rich of purines foods are excluded.

The most important factors of its development are the abdominal obesity (essential component) and the insulin resistance. Prerequisites are created for early development of atherosclerosis. The metabolic syndrome is a multi-component cardio-vascular risk factor. Therefore, kinesitherapy appears to be one of the main means of prophylaxis and plays a substantial role in the metabolic syndrome treatment. The kinesitherapeutic methods must include amoderate, long in duration physical load (2-3 hrs per day), moderate intensity workout including "treadmill" up to 60-70W with pauses between them. The workouts and the physical activity are performed within the limits of normal heat adaptation (20-22°C) in a comfort zone and the relative humidity is 40%. Light respiratory exercises are used as an introduction, also general development exercises by anatomic quality, auto-stretching. Each patient is tested in advance for cardio-vascular capacity, the arterial pressure values are measured and the pulse frequency is monitored. Physical exercise is not started at arterial pressure 130/80 mmHg at type 2 diabetes. The essential part of the kinesitherapy starts by gradual loading on the fitness devices. Workout for the upper, lower limbs and the abdomen muscles takes turns. This includes cross trainer, bicycle ergometry and various specialized devices for loading the upper and lower limbs, accordingly, and devices for training the abdomen muscles. The training ends with the "treadmill". We begin with 5-8 minutes moderate walking and end with 15-20 minutes at the end of the curative course. The kinesitherapy training lasts 2-3 hours daily, five days a week and should continue at least two months. The programme is drafted and performed under the control of a kinesiotherapist. D rest of 5-10 minutes is necessary between the moderate physical loads. It contains dynamic and static exercises, pendular and autostretching exercises. It is good to use the group method -0 3-4 patients. This creates good emotional status. It is recommended the kinesitherapeutic procedure to be held between 8 and 11 a.m. after breakfast and intake of medications – for the hypertonics and the type 2 sugar diabetes patients.

Active kinesitherapy is an introductory procedure in an integrated programme approach. We recommend also hydrotherapy to be included after the kinesitherapeutic procedure. Most suitable is the underwater massage of the whole body. Pressure up to 1 atm. in the abdomen area and 1.5-2 atm. on the limbs and paravertebrally. The distance between the nozzle and the skin must be

15 cm. Dosing of 25-30 procedures for two months, duration 30 minutes, five times a week. The first 5 minutes the patients relax in the water and adapt to its temperature.

Dietological methods – the diet is in compliance with the broad metabolic syndrome, which includes: type 2 diabetes, hypertonia, dyslipidemia, and obesity. Consumption of food five times a day is recommended up to 1200-1500 Kcal, with one or two days of relieve with intake of up to 600-800 Kcal, better in the days without kinesitherapy. The diet includes also the intake of water and lightly mineralized waters up to 1.5 liters per day. It should start 5 days prior to the inclusion of the complex curative-rehabilitation programme and to continue for life.

Dietary regime with adequate motivation is a compulsory device in the curative strategy of the metabolic syndrome treatment. It is included in the non-medication approach in the so called second step of influence. Giving up smoking, exact reduced diet of calories intake, qualitative changes in the food, increased physical activity, limited use of table salt, correct nutrition regime, new lifestyle – secure for most of the metabolic syndrome patients therapeutic success without medication.

Active kinesitherapy is a part of the curative strategy of the metabolic syndrome treatment. It refers to the non-medication approach in the therapy of the problem. Applied independently, it does not solve all cardinal manifestations of the syndrome. Having in mind the beneficial changes in the general status of the patients with metabolic syndrome resulting thereof, we propose it to be established as a therapeutic approach of first choice for patients with increased metabolic risk.

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## THEORETICAL-PRACTICAL ASPECTS OF EDUCATION IN NURSING CARE FOR MENTALLY ILL PATIENTS

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### ABSTRACT

*The article examines the theoretical and practical aspects of education in nursing care for mentally ill patients in order to build the necessary competencies of the psychiatric nurse. The purpose of the study is the students' mindset, knowledge and skills in working in the field of psychiatric nursing. The subject of the study is the training process in the field of health care. The object of the study is the satisfaction of the students in psychiatric nursing education and their approach towards working as a psychiatric nurse. The scope of study is 106 students in third and fourth year of "Nursing" program from the Faculty of Public Health and Health Care at the University of Burgas "Prof. dr. Assen Zlatarov".*

*The students' self-assessment and opinion on their knowledge in "Psychiatry" have been studied along with their expectations of the discipline "Nursing for mentally ill patients"; the content of this program; the efficacy of the practical work experience in the psychiatric areas; last, but not least, willingness and readiness to work as a psychiatric mental health nurse.*

*The analysis of the results shows that the training in the discipline changes the mindset of the students towards the choice of working in the field of psychiatric mental health nursing.*

**Key words:** nursing, student, mentally ill patients

### INTRODUCTION

When accomplishing one of the strategic priorities of the National Health Strategy (2014-20120) - building a human-oriented health system, it is a responsibility of the education of healthcare professionals. Policy 3: Providing human resources in healthcare to meet the growing, current and future health needs of people and Policy 6.2: Modern psychiatric care for people with chronic mental disorders is in line with the National Development Program Bulgaria 2020 [8].

The establishment of sustainable links and coordination between the different education and healthcare structures contributes to the continuity and complexity of the overall process of psychiatric healthcare. Educating the students in "Nursing" in knowledge and skills to apply new approaches and activities to ensure good mental health, as a basic human right, will lead to growth and sustainable development of society.

Psychiatric nursing is a separate area of health care for people with mental disorders. It must ensure the integration of theoretical knowledge, therapeutic mindset and practical skills, to support the development of autonomous

professionals with a defined professional identity that competently take responsibility for clinical tasks and defend their professional role.

The psychiatric nurse has basic and specific competencies and activities that are significantly different from those of other nurses. The professional skills of the psychiatrist include:

- working in a multidisciplinary team, taking a dignified, independent and responsible place in it;
- be prepared not only for clinical but also for communicational skills used in communicating with patients, their families, friends and coworkers;
- to recognize each patient as a respectable person;
- be ready for decision-making responsibility, according to its field and level of regulatory competence [3].

Clinical practice of students is a condition and a factor for the formation and validation of humane treatment of mentally ill people [5]. To build the necessary competences, lecturers should create conditions for goal settings and

goal formation of the student during their clinical practice and pre-graduate practice [4].

According to the normative documents [9], the theoretical training of students of the "Nursing" program is related to:

- the training in the discipline "Psychiatry", which is studied in third year, fifth semester and has a workload of 15 hours;
- the training in the discipline "Nursing for Mentally Ill Patients", studied in third year, sixth semester and has a working time of 30 hours;
- a clinical practice of a total of 42 hours and pre-graduate practice of 120 hours [10].

Through their research process, some authors ( Terzieva, Popova, Lecheva) are looking for innovative methods in the practical training of nursing students to improve the quality of education to make the process more comprehensive [6, 7].

According to other authors, "despite the modern training in psychiatric nursing and the increasing need for psychiatric nurses, the future nurses in Bulgaria have no mindset to work in psychiatric hospitals" [2].

**The aim** of the study is to study students' mindset, knowledge and skills to work in the field of psychiatric nursing.

**The tasks** are:

- to study literature on the problem
- to prepare an anonymous survey and survey toolkit
- to analyze results and draw conclusions and recommendations.

**The subject** of the study is the training process in the field of health care.

**The object** of the study is the satisfaction of the students in psychiatric nursing education and their mindset to work as a psychiatric nurse.

Scope of study is 106 students from specialty "Nursing", Faculty of Public Health and Health Care at the "Prof. dr. Assen Zlatarov" University of Burgas.

## RESULTS AND DISCUSSION

The survey was conducted in June 2015, 2016 and 2017. The survey included 85 third-year students and 21 fourth-year students, of whom 5 were men and 101 women.

The anonymous survey is aimed at studying the opinion and self-assessment of students of the specialty "Nursing" – third- and fourth-year regarding:

- their knowledge of Psychiatry and to express their expectations for the new module "Nursing for Mentally Ill Patients"

- the content of the program "Nursing for Mentally Ill Patients" after studying this theoretical and practical module;

- the effectiveness of the practical work experience in the psychiatric wards;

- their willingness and readiness to work as a psychiatric nurse.

At the end of the "Psychiatry" discipline, only 13.33% of third-year students estimate their knowledge of mental illnesses as good, 82.22% as satisfactory, and 6.67% of the surveyed students consider their preparation to be weak.

Almost all students - 97.8% - determine the discipline "Nursing for Mentally Ill Patients" as a necessity.

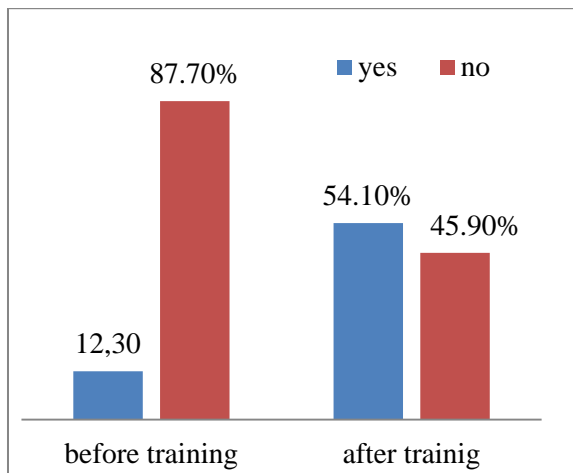
As to what they expect to learn from this discipline, the expectations of two-thirds of students are related to learning more about mental health. The sum of the percentages is more than 100 because the answers are more than one (Table 1):

**Table 1.** Expectations of students in the discipline "Nursing for Mentally Ill Patients".

Students expect to learn:	Responded 'yes'
How to care for mentally ill patients	97,8%
How to maintain mental health	73,33%;
Nursing care for frequent mental illness	71,11%;
Nursing care for addicted patients	57,78%;
Nursing care for severe mental illness	57,78%;
There is nothing more to learn	0%

When asked, before the training in the discipline, whether they would work as a psychiatric nurse, 12,30% of the respondents answered yes, 87,70% said they would not work in this area. Upon completion of the theoretical and practical training third-year students change positively their mindset towards working with patients with mental disorders. Some of the respondents - 54.10% feel prepared to work as a

psychiatric nurse, while 45.90% prefer another sphere of nursing ( Figure 1) :



**Fig. 1.** Students' choice to work as a psychiatric nurse

In order to get students' feedback on the content of the "Nursing for Mentally Ill Patients" program, they were asked which topics of the specialized training were most interesting and useful. The three-year students arrange the practices within nursing care as follows:

- Schizophrenia - 56.76%;
- Addictions - 54.05%;
- Depression - 29.73%;
- Bipolar Affective Disorder - 8.11%;
- Common mental illness - 2.79%.

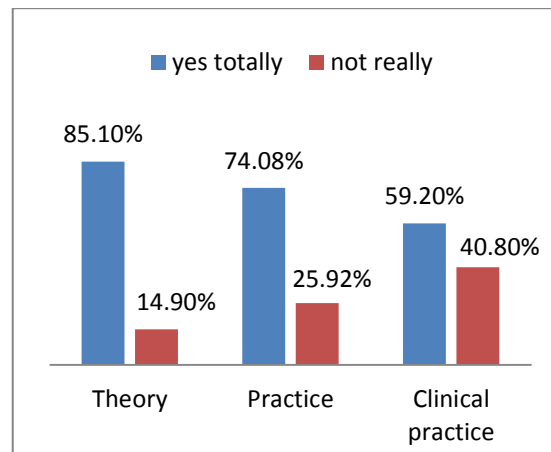
They would like to add more classes of Addiction to the "Nursing for Mentally Ill Patients" program- 18.92%; Depression - 8.11%; Psychopharmacology - 8.11%; Alcoholism - 2.79%; Care about patients in acute stage - 2.79%; and 16.22% of respondents think the topics are enough for their education (the sum of the percentages is more than 100 because the answers are more than one).

After the practical training, 72.82% of the students considered that the nursing education for mentally ill patients was sufficient to prepare them for the profession of psychiatric nurse.

The survey was able to establish students' satisfaction with the theoretical and practical training in psychiatric nursing care. The results data can be traced to the figure below ( Figure 2):

Students were also asked whether it is necessary to conduct training at the Center for Mental Health (CMH): 88.88% responds affirmatively, and 11.12% think it is not necessary. For pre-graduate traineeship at the

CMH 71,08% of the respondents consider it is necessary, 28,92% - not.



**Fig. 2.** Students' satisfaction for the training in psychiatric nursing

The students' opinion on the duration of the practical training at the CMH shows the following results:

a) practice: 29.63% vote for 2 weeks ; 25,92% for 3 weeks, 37,05 for 4 weeks, 7,40% for more.

b) pre-graduate traineeship: 33.33% vote for 2 weeks, 22.22% for 3 weeks, 25.94% for more than 4 weeks, 18.51% of the respondents for longer periods of training.

Another aspect of the anonymous survey is aimed at establishing students' views on the participation of working nurses in their practical training. According to 50% of the students, psychiatric nurses are actively involved in their training. Part of the students - 32% - say that the workers show an initiative and wish to participate in the practical training of the students. A very high percentage of the students - 66% - think that nurses have training skills and experience. Only 5% of students surveyed say that nurses are criticizing their skills.

## CONCLUSIONS AND RECOMMENDATIONS

Learning nursing care for mentally ill patients is a necessity for preserving and improving mental health.

The topics in the nursing program for mentally patients need to be enriched and expanded permanently.

Clinical practice and pre-graduate practice periods need to be increased to improve students'

preparedness to work with patients with mental health problems.

A more active participation of working psychiatric nurses in the training of interns should be stimulated.

Maintaining good interrelation between trainers, interns and psychiatric nurses enhances the quality of training.

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