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HRISTO BOTEV TEACHER TRAINING INSTITUTE IN BURGAS: HISTORY AND TRADITIONS

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ABSTRACT

The paper traces the history of Hristo Botev Teacher Training Institute In Burgas. Chronologically, it presents an overview of the most significant events and personalities who have contributed to its establishment and development as a major educational centre in south-east Bulgaria.

Key words: pedagogical education, traditions

After the Liberation of Bulgaria from Ottoman rule, Burgas experienced an economic boom, but education in the city straggled as a result of several reasons: the strong Greek influence, the presence of foreign schools and the lack of competent teachers. The first class of secondary school students was admitted as late as the 1904-1905 school year and the first graduates came out of the Girls High School in Burgas in 1912. The bourgeoisie put a greater stress on vocational training and for this reason the High School of Economics and the Mechano-Technical High School were founded in 1905 and 1925, respectively. The need for competent pedagogues, compulsory school education up to 14 years of age and the increasing number of classes in the five lower secondary schools in the city in the early 1940s led to the establishment of a higher educational institution: a pedagogical institute for training lower secondary teachers.

The Institute for Secondary Teachers in Burgas was opened under Ordinance No. 3575 of 2 August 1943. Its first director was Toma Konstantinov Mitrushev. The teaching staff included Petar Ivanov (Literature), Ivanka Seyrekova (Geography), Hristina Zadgorska (History), and Petar Pamporov (Pedagogy). Part-time lecturers in the Institute were: Tatyana Lipchinska (French), Elitsa Yakimova (German), Vladimir Ososkov (Physics), Krum Mumdzhiiev (Music), Pavel Valkov (Art), Elena Sheyretova (Mathematics), Siya Kotova (Physical Education), priest Dimitar Popnikolov (Religion), Krum Kosharevski (Handicraft), and Vyara Feschieva (Needlework and Housekeeping).

After passing an entrance examination, the first 75 female and 11 male students were admit-

ted to the Institute. The courses were organized in two main fields: History and Philosophy, and Physics and Mathematics.

History in dates and events

The first semester began on 4 October 1943 in the building of St. St. Cyril and Methodius School. In the same year Students' Day was celebrated in Burgas for the first time with a party in the gym of the Boys High School.

On 29 December 1948 the Teacher Training Institute was named after poet and revolutionary Hristo Botev. The first official celebration of the patron's day took place in 1950.

In 1954 the first part-time students of lower secondary school education enrolled.

From the mid-1950s training was offered in five major fields of study: Bulgarian language and literature, Russian language, Mathematics and physics, History and French language, and Natural sciences, geography and chemistry. The term "course participant" was substituted for "student" in the 1955-1956 academic year.

Under Ordinance I-1933 of 21 May 1960 the Institute for Lower Secondary Teachers was transformed into the Institute for Primary and Pre-Primary Teachers. A few months later, the Lower Secondary Teachers sector reopened and the admission of such students continued until the 1964-1965 academic year.

In the 1966-1967 academic year a transition to departmental studies took place and five departments were established: Pedagogy, Aesthetic Subjects, Mathematics and Natural Sciences, Language Teaching, and Marxism. From the next year the number of departments increased to

seven. In 1973 the Pedagogy Department split into the Department of General Pedagogy and the Department of Pre-School Pedagogy, headed by A. Georgiev and F. Manoylova, respectively.

From 1983 the Teachers Training Institute became the site for the state pre-service practicum of students from Sofia Kliment Ohridski University and their primary and pre-primary curriculum was piloted at the Institute.

In 1987 the Institute was the host of the research teams who designed the new curricula for pedagogy (chaired by Detelin Kostadinov) and psychology (chaired by Tsvetan Asenov) for the pedagogical institutes in this country. In the same year the above lecturers developed a curriculum for acquiring teacher's qualifications for the Faculty of Social Professions of Prof. Dr Assen Zlatarov Higher Institute of Chemical Technologies. For a decade it was used to train students from the Higher Institute and people from the region of Burgas who had graduated from other universities.

In 1989 the educational institution was incorporated into Sofia University under Ordinance of the Council of Ministers No. 52 of 9 November 1989. As a result, competitions for PhD students were announced and the curricula and course programs were standardized.

In 1991 the Institute was integrated into Plovdiv Paisii Hilendarski University and it welcomed undergraduate students of Pre-School Pedagogy and Primary School Pedagogy. It trained Bachelor degree students during their first three years, offered re-training courses and part-time studies, etc.

Under Ordinance of the Council of Ministers No. 17 of 1997 the Teacher Training Institute was transformed into the Faculty of Pedagogy of Prof. Dr Assen Zlatarov University, Burgas. The first successfully accredited Bachelor Degree programs were Pre-School Pedagogy and Primary School Pedagogy, followed by Pre-School and Primary School Pedagogy, Pre-School Pedagogy and Foreign Language, and Primary School Pedagogy and Foreign Language. The first Master's program, Alternative Didactic and Methodological Technologies in the Kindergarten and Primary School, started.

On 24 March 2000 the Council of Ministers approved the new university structure proposed by the Academic Council of Prof. Dr Assen Zlatarov University and the staff of the Faculty of Pedagogy became part of the new Faculty of Social Sciences.

Personalities

The post of Director of the Teacher Training Institute was held by: Toma Konstantinov (1943-1944), Todor Penev and Lyuba Boyadzhieva (1944-1945), Yordan Markov (1945-1947), Boyan Rizov (1947), Boris Golemanov (1947-1952), Nedyalka Kasabova (1952-1953), Ivanka Seyrekova-Velcheva (1953-1961), Atanas Kozarov (1961-1967), Tsvetan Asenov (1968-1990), and Todor Hadzhipetrov (1990-1997). Deans of the Faculty of Pedagogy were Todor Hadzhipetrov, Detelin Kostadinov, and Petko Buyukliev.

The teaching staff of the Teacher Training Institute included a number of distinguished scholars and artists in 1943-2000, amongst whom:

- Pavel Valkov, associate professor in the Nikolay Pavlovich Higher Institute of Arts, Sofia;
- Nikola G. Nikolov, professor of Literary Studies in St. St. Cyril and Methodius University, Veliko Tarnovo;
- Georgi Baev, artist, laureate of the Herder Award of the Vienna Academy of Arts, exhibited in London, Moscow, Vienna, Budapest, etc.;
- Petko Zadgorski (the Art Gallery of Burgas was named after him), muralist, sculptor and painter, pioneer in the construction of sports boats in Bulgaria;
- Panayot Dimitrov, taught sculpture at Veliko Tarnovo University (1965-1978), member of the Academy of Modern Art in Rome;
- Boris Ibrishimov, music teacher, founder of a children's choir in Burgas, choral music writer;
- Dimitar Karadzhov, director of the Music School, the first conductor of the State Symphonic Orchestra in Burgas, author of dozens of rhapsodies, suites, ballads and choral songs;
- Strahil Popov, associate professor in St. St. Cyril and Methodius University, Veliko Tarnovo;
- Prof. Ivan Kutsarov, Dr of Philology, rector of Plovdiv Paisii Hilendarski University;
- Prof. Galya Hristozova, Dr of Pedagogy, rector of Burgas Free University;
- Prof. Evelina Dineva, PhD, vice rector of Burgas Free University;
- Ass. Prof. Maria Ganeva, PhD, dean of the Centre of Humanities, Burgas Free University;

- Prof. Stoyan Kralev, State Musical Academy;
- Prof. Emilia Rangelova, Dr of Pedagogy, Sofia Kliment Ohridski University;
- Konstantin Tashev, left an unforgettable mark in the theatre and amateur art in Burgas;
- Dechko Stoev, honorary citizen of Burgas, the art gallery in Pomorie was named after him;
- Damyan Zaberski, art award winner in Magdeburg and Stralsund;
- Mihail Angelov, winner of the Burns academic award, laureate of the World Festival of Youth and Students in Bucharest;
- Kiril Simeonov, artist, honorary citizen of Burgas;
- Dimitar Kostadinov, poet, honorary citizen of Burgas.

The teaching staff also included well-known local ethnographers (Goro Gorov, Krali Kralev), co-authors of textbooks for teacher training insti-

tutes in history (Tsveta Boneva) and biology (Ganka Yordanova), inventors (Petko Sirekov), public figures, etc.

The Teacher Training Institute changed the appearance of Burgas and gave it its students' city status. Its work was truly prolific: it educated over 15,000 teachers for low secondary, primary and pre-primary schools. Today, the Faculty of Social Sciences as its worthy successor continues the tradition of training pedagogues for the region of Southeast Bulgaria.

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LATE BRONZE AGE POTTERY ON THE TERRITORY OF UPPER THRACE VALLEY

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Historical Museum of Karnobat

ABSTRACT

The main purpose of this article is to present Late Bronze Age pottery with an emphasis on ceramics diversity, technology, distribution, use and the discard of vessels in archaeological contexts, which can add clarity about the main features of the ceramics from the period. According to function, vessels can be classified as tableware, cooking ware and storage and transportation containers, the majority of them belonging to cooking ware. The archaeological assemblages contain locally produced hand-made pottery. A few wheel-made fragments have been found, but they are all considered imports. The following hand-made vessels display a large variety of shapes: cups, jugs, plates, bowls, kantharoid-like vessels, amphora-like vessels, jars, salt cellars, storage vessels and piraunoi common in a vast area. The observation of technological characteristics of the Late Bronze Age vessels defined existence of two systems of making pottery during the period – household production and household industry, which means that the pottery production is located exclusively within the household. The clay and tempering materials likely were those locally available at little, or no cost to the potters. The potters during the Bronze Age can be defined as “independent specialists” who produced utilitarian vessels. Such vessels are used for food preparation, cooking, and serving and generally are vessels used for household sustenance. The pottery show low standardization - i.e. a wide variety of pots (such as clay and forms), no routine in production, as there is a manifestation of one's own behavior. Probably the women (!) replace the vessels which have been chipped or broken in the course of the year, while the other forms (Jugs, big Cups) and some equally indispensable utensils were purchased from same craft specialist. Pottery manufacture was probably periodic, as the vessels were produced at certain times of the year, or only when households have need of them. The result was a fair amount of variation of vessel shape and other attributes. In this context, that domestic craft production may have been part-time activity, because of the discontinuous nature of work and a primary commitment of household members to the production of food. Nor wheel using and kiln. Firing was at a relatively low temperature. Much of the Late Bronze Age ceramics is distinguished by its friability. The various surface colors and black stains suppose using of open fire technology through hearths or pits.

Key words: *Upper Thrace Valley, Late Bronze Age, Late Bronze Pottery, Production organisation, Craft specialization*

The period of the Late Bronze Age (16/15th-12/11th century BC) was a time of ethnic consolidation in Thracian society, a process reflected in ceramic assemblages from that period. Certain features of pottery production and design which emerged during that period persisted throughout the Early Iron Age that followed (Bozkova 2015, 229). Regrettably, absence of thorough studies as well as mostly inconclusive published results from studies of important archaeological Late Bronze Age sites in the Upper Thrace valley account for the big gaps in our knowledge of the development in

pottery production and its use in the region. The realization of various infrastructure projects during the last ten years has supplied recent results with more complete and detailed information but the newly collected data has not yet been summarized. Today, interest in that pottery is stirred up mainly by the obscure regional characteristics of the ceramic assemblage, as well as the opportunities provided by this material.

The main purpose of this article is to present Late Bronze pottery with an emphasis on ceramics diversity, technology, distribution, use

and the discard of vessels in archaeological contexts, which can add clarity about the main features of the ceramics from the period.

I will start by introducing Late Bronze pottery, which on the base of technological features, such as clay quality, wall thickness, surface treatment and level of firing can be divided into various groups. According to function, vessels can be classified as tableware, cooking ware and storage and transportation containers, the majority of them belonging to cooking ware. The archaeological assemblages contain locally produced hand-made pottery. A few wheel-made fragments have been found, but they are all considered imports. The following hand-made vessels display a large variety of shapes: cups, jugs, plates, bowls, kantharoid-like vessels, amphora-like vessels, jars, salt cellars, storage vessels and piraunoi common in a vast area (Bozkova 2015, 229-230; Hristova 2011, 104-137). It is worth noting that not every shape has been attested at each site. Local combinations of shapes vary, with certain types predominating: for example jugs and cups at Nova Zagora cemetery (Kanchev, Kancheva 1990); kantharoid-like vessels in Ovcharitsa cemetery (Kancheva-Russeva 1991); jugs and cups at Malkata Mogila Tumulus and Manchova Mogila Tumulus (Kanchev 1991, 42-44; 46-47), and so on.

Cups are among the better preserved vessels in the region. Body form and mouth diameter are the major criteria for putting cups in that classification unit. The size of the body and the inverted mouth rims testify to the major function of cups as drinking vessels. They can be divided into two main groups: big cups with high hollow feet and small cups with a flat base. S-profile vessels, inverted truncated cone-shaped, cylindrical and spherical cups can be said to have been in wide use. Some of the vessels are richly decorated with *Furchenshtich*, a type of decoration typical for the period, placed on the widest part of the body. Ornamentation includes mainly angles, triangles and rhombs, sometimes ending with spirals.

Jugs were also among the most popular vessels for everyday use during the Late Bronze Age. Most of them have spherical, flattened-spherical or oval bodies with conical necks; on the territory of the whole Upper Thracian valley were found few samples with rich decoration through *Furchenshtich*. The preferred motif is the circle, which, in many cases in combination with other geometric elements, creates an impression

similar to the so-called "solar motifs". The inclusion of additional elements such as spirals, straight or curved lines, dots, combined in different ways give the impression of a variety of these "solar images" (Borislovov 2002).

Plates and bowls can be defined as food-serving vessels. Although both categories are associated with food consumption, certain differences in their function are suggested. Bowls were used for food distribution and were therefore deeper, while plates were used for food consumption. The presence of a spout in some vessels is an indication of their main function associated with the serving of food. Finding the fragmented ceramics sometimes creates a problem in distinguishing between bowls and plates because of their similar forms. Most of the vessels have slightly bi-conical or spherical to hemispherical shapes. Some of them are equipped with spouts, a form popular since the Middle Bronze Age (Leshtakov, Tsirtsoni 2018, 486, 488, Fig. 5). Most plates and bowls are not decorated, or have very ordinary ornamentation, such as knobs. In a few cases ornaments such as angles, triangles, rhombs, nets, stylized birds were incised over the whole outer surface. The rich ornamental style of the vessel follows the traditions of Balkan geometric style characteristic of the culture with encrusted pottery in Northwest Bulgaria, Southwest Romania and Northeast Serbia in the Late Bronze Age; there were no similar or identical decorations on the territory of the Upper Thracian valley (Kancheva-Russeva 2000, 325; Shalganova 2005; Fig. 33, 46).

The *kantharoid-like vessels* have a specific form and style characteristic for the Late Bronze Age: rounded bodies, conical necks, sometimes with a low hollow base. Two arch-shaped handles are attached to the orifice. That shape is represented in some types which differ in the location of the handles and the transitional part between the neck and the shoulders. Some of the vessels are richly decorated with incisions which cover most of the body and the lower part of the handles. Designs with triangles are popular while dots and lines are added to the composite pattern. The relief decoration of small knobs applied in the zone of the shoulders is also notable. Spherical kantharoid-like vessels are wide spread on the Balkan Peninsula; they were quite typical for a long time: from 1600 to 1200 BC (Bulatovich 2011, Fig. 1). Kantharoid-like vessels with hemispherical shape, a straight profiled neck, high hollow feet or a plate base, and specifically shaped relief decoration on the

top of the handles are identified as belonging to the transitional period between the Late Bronze and the Early Iron Age (Kuncheva-Russeva 2000, 325).

The shape of *amphora-like vessels* undoubtedly points to their function as liquid storage and transportation containers. Amphorae-like vessels were also among the popular classes during the Late Bronze Age, attested in several types. Most numerous in this category are those with a funnel-like rim, a flaring neck and a spherical or ovoid body with two or four vertical handles at the broadest part, with a flat bottom or small feet. Decorations such as knobs, lugs and plain relief bands were applied at the transition between body and neck or in the zone of maximum vessel diameter. It should be mentioned that the type of Amphorae found in Plovdiv and Razkopenitsa is quite characteristic of the cultures in the west, on the territory of Koprivlen culture and Brnjica culture, where they have been excavated from graves with cremations in flat necropoleis, dated as 12th-11th century BC (Alexandrov, Petkov, Ivanov 2007, 373-388; Luci 2007). All of these vessels display regional differences and variants belong to populations from different cultural groups with diverse material and spiritual cultures. Their west to east distribution marks the direction of their gradual spread (Bulatovich 2011, Map. 2). The most eastern site in which they have been discovered is the Vratitsa archaeological site, where amphorae decorated with small knobs created by pushing inside out testify to a later date – the transition between the Late Bronze and Early Iron Age (Hristova 2010, 44).

Jars as kitchen ware were used mainly for cooking. These are the most numerous vessels in the ceramic assemblage of the archaeological sites, as they were probably the most commonly used vessels during the Late Bronze Age. The different types can be distinguished according to the shape of vessels and their mouth: pots with oval, cylindrical, conical, beehive-shaped body. Some of them have a short straight or strongly out-curving neck. Vessels have three varieties of handles - two symmetrical vertical handles placed on the widest body part, tongue-like handles or crescent-shaped handles. Their decoration includes plain bands or sometimes bands bearing oval finger imprints and incisions. Usually, these are situated outside on the rim or below it. Only one complete vessel and a few fragments belonging to small size pots stand out in the assemblage with a single or bifurcated

tongue-shaped lug inside, about 3 cm below the rim. The only whole preserved vessel is not decorated, while on the fragments decoration consists of slashes on the lip or the rim outside and one of the fragments bears an appliqué of combined curved and straight relief bands. No lid fragments were discovered: these lugs were not lid supports. Their function is probably similar to the popular andirons widely used in the Bronze Age and later (Hristova 2011, Fig. 21).

Piraunos is a generic term for what was portably cooking equipment, known in the literature as “portable hearths with or without embedded vessel”, to which in sufficient attention has been paid in the literature. The vessel body includes an embedded pot, central and ventilation openings, stands and a base. The variety of shapes might have been due to both the function of the piraunoi, and the individual taste of the potter. Combinations of two or more kinds of openings on one stand are also possible. Sometimes there are finger imprints, pricks and cuts. Decoration on the built-in vessels of the piraunoi is similar to that on the pots. Decoration on the middle of the stands is only rarely observed. On the territory of the Upper Thrace valley, only one full graphic reconstruction of this class of vessel was found, at the Vratitsa site. The Piraunoi from Vratitsa can be classified under A1 type with a built-in vessel after Romsauer, IA type after Scheffer, and A3 type after Romsauer (Romsauer 2003, 171).

Four principal types of decorations have been attested from the Late Bronze period: incised, Furchenshtich, relief and pricked decorations. Plastic decorations prevail in the form of plastic bands with differently rendered finger imprints and cuts. Storage vessels, pots and amphora-like vessels were mainly decorated in this way. Knobs and lugs are mostly typical of amphora-like, kantharoid vessels and jugs. The Furchenshtich technique, a specific characteristic of Late Bronze Age ceramics, is attested on fragments from kantharoid-like vessels, jugs, bowls and cups. Designs with triangles and lozenges were very popular while incised circles, dots, pricks and lines fill in the triangles and lozenges in composite patterns. The decoration was applied in the zone of the maximum vessel diameter, below the rim and on the handles. In some cases, the central place in the overall composition is taken by solar symbols or spiral figures. The motifs organized around the centre are frequently bound by linear or figurative friezes located along the shoulders or the base of

the vessel. As a result of this variety, it is difficult to find two completely identical images of a solar sign not only on the territory of an archaeological site, but even on the walls of the same vessel. The use of the principal decorative patterns conforms to vessel category.

Composite motifs decorated fine vessels, while simpler ones (plastic bands, knobs and cuts) were applied on coarse and thick-walled vessels. Researchers have relied on morphological traits and decoration as criteria for distinguishing regional pottery groups, their origins, and ethnocultural interactions. Upon analysis of the features of Late Bronze Age pottery complex from the Upper Thracian valley great similarities became apparent with the pottery from the Eastern Rhodope Mountains, where decorations are richer and more varied. Certain features of pottery production of Late Bronze Age design persist throughout Thracian during the Early Iron Age that followed (Popov, 2018, Fig. 10,11; Nikov 2016; Dimitrova 2014).

Though some research has been done, very little is known about the technological characteristics of Late Bronze Age pottery from the studied region. Details on the clays, surface finishing and firing are mentioned in very general terms in the publications which makes difficult any attempt at outlining possible regional specific features. Key specifics of local production can be defined as clay including assorted tempers and shape and modelling by hand. Most of the vessels have a spherical shape, thick walls, burnished surfaces. The firing process took place in imperfect reducing atmosphere, because on the pottery surface there are various colours.

Available data shows that the composition of the clay used for the manufacture of the vessels and their surface finishing are directly connected to the region of their provenance. The personal observation of the author shows that there exist three main principal groups of clay paste ("clay" in short) from which vessels were formed: *fine*, *coarse* and *very coarse* clay. Fragments made of coarse clay prevail. The following inclusions (tempering) have been attested: quartz particles of different sizes, light and dark mica, chamotte and organic materials (documented mainly as tiny straw impressions), while their combination is different in the different archaeological sites. It is certain that light and dark mica are natural admixtures as they are present in all fragments regardless of the shape and function of the vessels. Quartz sand particles, chamotte and

organic material are considered additions deliberately introduced by the potters. Some of the clay includes fragmented rock prepared in advance and added from the potters. Light and dark mica and sand grains of small and medium size, often mixed with chamotte and organic particles, comprise the contents of *fine clay*. Plates, bowls, jugs, cups and kantharoid-like vessels were made of such clay. Incised and Furchenstich decoration is typical of these vessels. No fragments made of very fine clay were found in the archaeological complexes. This group included only clay with light and dark mica and tiny grains in lower concentration and was represented by imported wheel-made samples. *Coarse clay* is characterized by a higher concentration of medium- and small-size quartz grains, crushed rock, mica, chamotte and organic particles. Mainly amphorae, kantharoid-like and pots can be included in this group. A relief band with cuts usually decorates these vessels. In some other cases, they have relief applications, lugs and knobs. *Very coarse clay* includes light and dark mica, medium- and big-size rock and sand grains in higher concentration, chamotte and organic particles. Most of the fragments originate from big pots, vessels for storage and piraunoi. Decorations are only of the relief or finger imprint type. The clay from different archaeological sites displays a different combination of tempers. Thus a large variety in paste composition shows a high frequency of vessels made by different artisans.

Forming techniques of Late Bronze Age vessels were among the simplest hand-building techniques used in ceramic manufacturing – pinching and ring-building methods. Pinched vessels were made by holding a ball of clay in one hand and shaping it with the other hand by making a hole in the centre and then thinning the vessel wall by drawing the clay out from the base with thumb and forefingers. Pinching is well suited to forming small vessels (cups; small plates; bowls) but also to forming the bases of larger vessels. In these cases, the upper part of the vessel was formed by adding coils with an approximate width of 5 cm or coils from pull-up modelling of the walls. Ring-building is another technique by which one or more flat slabs of clay, formed as coils, are pressed together into the desired vessel shape. The coils can be joined together by hand or by a wooden tool. This technique was used for building large and very large vessels.

Handmade vessels can be divided into some technological groups according to the type and manner of surface treatment: very rough surface or uneven surface; smoothed and burnished surface. Vessels produced from fine clay have smoothed or burnished surfaces, while coarse clay vessels have smoothed or very rough surfaces. Smoothed surface has a uniform texture, as the no glossy appearance is probably the result of the final forming by the potter's wet hands. Burnished surfaces are more lustrous than smoothed ones, but the lustre is irregular, and it is possible to identify lines left by the passage of the polishing over the vessel (Sinopoli 1991, 25-26). The burnished surface was achieved by using small pebbles after drying the vessel, as the left traces are visible to the naked eye. Some vessels show evidence of a shell being used to achieve the desired form. Given the fact that Late Bronze Age settlements were established close to rivers, using river shells as forming tools is understandable. Pottery surfaces included various colours, mostly shades of brown, black, grey, red and beige. Cores display a huge variety: one-, two, three, or multi-layered breaks, betraying different open-firing conditions.

Most Late Bronze Age material comes from *flat necropoleis* (Nova Zagora, Kermen, Staroto Selishte, Polski Gradets, OvcharitsaII, Drama, Badu bunar, Tsenino, Manole, Djendem tepe)(Kanchev, Kancheva 1990; Nikov, Stoitsov, Yorgova 2010; Savatinov 1995, 147-149; Nikov 2001, 70-71; Kancheva-Risseva 2000; Lihardus, and kol. 2001, 172; Koichev 1959; Gotsev 2008, 110), *tumuli* (Manchova Mogila Tumulus, Malkata Mogila Tumulus)(Kanchev 1991, 42-43; 46-47), *villages* (Razkopanitsa tell, Ovcharitsa-1, Asenovets, Staroto Selishte, Vratitsa¹, Zagortsi, Chokoba)(Detev 1968, Fig. 22; Kancheva-Russeva 1991, 71-74; Kanchev 1984, 136-149; Savatinov 1995; Hristova 2011, 104-137; Kancheva-Russeva 2010, 170-171; Kancheva-Russeva, Koleva 2011, 147-150; Leshtakov 2010, 129-131; Leshtakov 2011, 126-129) and *pit complexes* (Badu bynar, Plovdiv)(Hristova 2009, 41-42; Detev 1964). The preferred burial inventory in the flat cemeteries were cups, jugs and kantharoid-like vessels. In general, the decorated vessels found in graves are not numerous (Malkata Mogila Tumulus, Nova Zagora, Drama, Ovcharitsa and Kermen).

¹ Some of the pottery drawings from Vratitsa site are made by V. Petrova and N. Todorova (Sofia University) with additional work by the author.

Finding a decorated kantharoid-like vessel with a bronze rapier (the term for a slender, sharply pointed sword) in the grave of Drama, as well as a decorated jug together with a bronze arrow from the Malkata Mogila Tumulus shows that decorated vessels were a luxurious commodity. These decorated ceramics were placed in the graves of warriors or special status people.

The type of vessel excavated from a grave with cremation located close to the village of Manole is described in the literature as amphora type Gava A. This amphora is interesting because its shape was unfamiliar in Thrace and had no further development. Conversely, it was typical in the Carpatho-Danubian region's fluted pottery cultures, dated probably in the 11th century BC, but not later than the second half of the 10th century BC (Gumã 1995; Chichikova 1968, 17-18; Gotsev 2010). According to Al. Gotsev these vessels mark the transition period between the Late Bronze Age and the Early Iron Age in Thrace. Despite the cremation from the Malkata Mogila Tumulus, the burial sites of Badu bynar, Manole and Djendem tepe are also in contrast with the tradition of inhumation common in the region during both the Late Bronze and Early Iron Age. It is possible that these objects trace some movements of people or ideas in the first centuries of the Early Iron Age (Gotsev 2010, 76).

Unlike cemetery materials, the ceramics from the settlements represent all known categories for the period. That archaeological assemblage also contains a few wheel-made fragments (no complete vessels have been found) which are considered imports. In the Upper Thrace valley, such pottery only came from the archaeological sites of Vratitsa (Bourgas district)(Hristova 2011, 105) and Drama (Yambol district)(Lihardus at all. 2002, 177, Abb. 12). Such fragments serve as evidence of direct contacts with the large production and trade centres in the Aegean and Anatolia (Troy VIb) throughout the Late Bronze Age.

The observation of technological characteristics of the Late Bronze Age vessels defined existence of two systems of making pottery during the period – household production and household industry (Sinopoli 1991, 99; Peacock 1982, 8, 13, 17), which means that the pottery production is located exclusively within the household. Each household makes pottery for its own use and mechanical solidarity characterizes the society, as there are no specialists and no division of labor except by

sex. The clay and tempering materials likely were those locally available at little, or no cost to the potters. The potters during the Bronze Age can be defined as “independent specialists” who produced utilitarian vessels. Such vessels are used for food preparation, cooking, and serving and generally are vessels used for household sustenance. The pottery shows low standardization - i.e. a wide variety of pots (such as clay and forms), no routine in production, as there is a manifestation of one's own behavior. Probably the women (!) replace the vessels which have been chipped or broken in the course of the year, while the other forms (Jugs, big Cups) and some equally indispensable utensils were purchased from same craft specialist. Pottery manufacture was probably periodic, as the vessels were produced at certain times of the year, or only when households have need of them. The result was a fair amount of variation of vessel shape and other attributes. In this context, that domestic craft production may have been part-time activity, because of the discontinuous nature of work and a primary commitment of household members to the production of food. Nor wheel using and kiln. Firing was at a relatively low temperature. Much of the Late Bronze Age ceramics is distinguished by its friability. The various surface colors and black stains suppose using of open fire technology through hearths or pits. The archaeological context of ceramic finds shows that during the Late Bronze Age the vessels were used in the daily life subsequently were engaged to the funeral practice as part of the grave goods. Finding decorated vessels together with bronze weapons (rapier, arrow) in some graves shows that the decorated wares were luxurious commodities, and placed within graves of warriors or people with a special status. This bi-functionality of pottery usage, as well the traces of repair of some vessels shows the inability of each group to manufacture clay containers (Detev 1964, 66). Thereby, the level of ceramic development fully corresponds to the Chiefdom development of the Late Bronze Age society, where the leaders kept their power mainly through the metal control, not through redistribution of ceramics.

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**RELIEFS WITH DEPICTIONS OF *HEROS STOMIANOS*
/PROBLEMS OF INTERPRETATION/**

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ABSTRACT

This paper presents an illustrative example of the contacts maintained in the West Pontic coast in Antiquity. It focuses on a votive relief from Ahtopol dedicated to Heros Stomianos which was found at the vicinity of the town. The author argues that most likely this monument had been brought from the presumable sanctuary of the Heros situated at the modern Karaburun Cape in Turkey, about 35 km north-east from the mouth of Bosphorus.

Key words: relief Heros Stomianos, Pontus

The votive relief from Ahtopol dedicated to Heros Stomianos was found at the vicinity of the town (Kacarow 1927, 327, n. 13). It is a trapezoidal marble slab, upper left and lower right part broken off. The figure of the Thracian Horseman is depicted according to the conventional model – type B under the typology developed by Zl. Gočeva and M. Oppermann (Gočeva, Oppermann 1979, 112-113, n. 172). The inscriptions are placed within the fields under and above the relief. The inscription above the Horseman reads: [Ἡ]ρωι Στομιανῶ and dedicator's name as well as his son's name are placed under the depiction (AM Burgas Inv. No163) (Mihailov IGBulg. I² n. 474).

The deity's name is connected with the Heros in his capacity of patron/protector of shipping along this part of the Pontus. Most likely this monument had been brought from the presumable sanctuary of the Heros situated at the modern Karaburun Cape in Turkey, about 35 km north-east from the mouth of Bosphorus. This opinion of G. Kacarow's has been adopted by L. Robert (Robert 1959, 194-196 after Mihailov IGBR, n. 474) and substantiated by sufficient evidence that I shall present in brief hereunder.

First and foremost, the relief may be compared to several reliefs from the Archaeological Museum in Istanbul. They had been sold to the Museum by villagers of the nearby village of Terkoz (ancient Delkos) in 1913 (Mendel 1913, Inv. No 1333). The presence of these monuments is assumed as convincing proof that there had been a sanctuary of Heros Stomianos here. According to G. Kacarow who

used information provided by Mendel, namely that one intact relief and several fragments of similar reliefs had been found at the mouth of Bosphorus; the Heros had been worshiped "as patron of voyagers who from the entrance of the Pontus made their way into the open, stormy sea" (Kacarow 1934, 2-3).

A glimpse at shipping in this part of the Black Sea provides the possibility of strictly specifying the functions of this sanctuary.

Until a lighthouse was built and rescue service organized in the middle of 19th century, entering into Bosphorus from east was a severe trial to sailing-boats crews, especially in winter. Heavy winds, dense fog and irregular currents made this task extremely hard and dangerous. Pilot warns that sailing in immediate proximity to the shore should be avoided, even in clear weather. Heavy beating of waves and indefensibility from north winds made it impossible for sailing-boats to be anchored and manoeuvred. The area of the Terkoz Lake is a large sandy plain that is confined on the one side by Karaburun Cape and on the other side by the first ranges of a mountain chain which stretches parallel to the coast from north. Besides, the lake is quite large and is confined by upland. As from the side of the sea this place bears a close morphological resemblance to Bosphorus and that is why it is called the False Mouth (Falsum Stoma; Yalancı Karadeniz Boğaz, False Canal). The sandy valley to the north had been covered with ship wrecks. The shallow depth and reefs also frequently caused shipwrecks (for the sea conditions see e.g. Stronk 1985, 209-210). In

combination with bad weather conditions, these factors added to the centuries-old notoriety of this seacoast as ship cemetery.

A glimpse at the map is enough to be realized that in this part of the Black Sea the coast is orientated almost to the north. Keeping a safe course requires following a distance well far away from the shore. Taking into consideration the wind rose, it becomes obvious that with the north and north-east winds prevailing along the West Black Sea coast, sailing in proximity to the shore is a real navigational test. Even nowadays yachts under sails run into grave difficulties when tacking near the shore, especially north-northeastward. These factors substantiate the existence of a sanctuary and the necessity of the divine interference of the Heros who was to draw the sailors away from the False Mouth.

There is another view concerning etymology of the epithet of the Heros. Basing on linguistic comparisons with the Indo-European root “stem”, the ancient Greek meaning of the epithet is rejected. In this case it is assumed that Stomianos is not an ancient Greek name consisting of $\sigma\tau\acute{o}\mu\alpha$ and the suffix $-\alpha\nu\omicron\varsigma$, but a Thracian one-root name which means “the one who draws the ships/boats away”. That is why the author suggests that the sanctuary was not intended for the sailors who entered the mouth of Bosphorus but it was meant to draw sailing vessels away from Karaburun Cape (Vlahov 1985, 362-363).

These perils, however, are not due to the cape itself but due to the resemblance between this environment and the appearance of the entrance to Bosphorus. On the contrary, the cape jutting out into the sea is actually a trustworthy navigational landmark and it is hardly a coincidence that it is its top that has been chosen nowadays for erecting a lighthouse on.

This landscape amazingly resembles Salmydessos coast whose description we have from literary evidence. The mentioned Salmydessos coast has not been definitely localized yet, although at present it is considered identical with Midya (the modern village of Kiyıköy). It is obvious from the comprehensive analysis of literary evidence that it is still not clear which segment of the Pontus the toponym Salmydessos had been exactly ascribed to.

Naturally, prevailing are the evidence of autopsic character. First of all, it is Xenophon's *Anabasis* with its detailed description of the stages of mercenary's expedition along this part of Pontic coast. The leader of Greek mercenaries

saw the ship wrecks at this place and even arrived at the conclusion that these ship wrecks were caused by the shoals here (Xen. *Anab.* 7.5.12-14).

Xenophon's text corresponds with what Straton of Lampsakos (the second half of 4th century BC) says about Salmydessos coast (Straton of Lampsacus (ap. Strabo 1.3.4 ed. Meineke 1877). He describes it as a marshland.

In the periegesis ascribed to Scymnos of Chios where the data for the West Pontic coast had been extracted mostly from the work of Demetrius of Kalatis (the end of 4th – beginning of 3rd century BC) Salmydessos is considered as coast. Its total length is 720 stadia. This coast was too marshy, almost inaccessible and had no harbour; these made it very dangerous to ships (Pseudo-Scymnus 724-727 ed. Müller GGM I, vv. 724-727, p. 224-225).

Dionysius of Byzantium provides a description of the way the ancient sailors applied to detect the true channel and the organization of the light service at the entrance of the Bosphorus. The text is more than eloquent: “*ex hac turre faces ardentes noctu sublata perferebantur, recte viae ad Ponti ostium duces*” [Torches shining brightly at night had been brought to this tower to point the right direction towards the entrance of the Pontus]. Further, the historian provides a curious description of the practice that local barbarians used to lead the ships out of the right way. This information is much more valuable as it is convincingly related to what Xenophon mentioned about the Thracian tribe of Melinophagoi at Salmydessos. Although Xenophon's text is well-known and often cited, the following paragraph of Dionysios of Byzantium's work is very rarely taken into consideration (this part of his work is preserved only through the Latin translation of P. Gillius): “... *at barbari verarum facium fidem auferabant, praetendentes ex Salmydessi littoribus fraudulentas faces, ut in errorem nautas inducerent in naufragiaque subducerent*” [however, barbarians had shaken the trust in real torches as they used to light deceitful torches along the Salmydessos coast in order to mislead the sailors and guide them in the wrong direction]. Then the writer describes the Salmydessos coast : “... *ora enim maritima importuosa est et maris vadum ob excessum aquarum ancoris non firmum, et paratum his, qui aberrarunt a recta via, naufragium signis veris confusis cum falsis significationibus*” [there are no harbours along these sea shores, the sea

bottom is not reliable for casting anchors due to the shoals and those who, having been misled by the deceitful torches, steered out of course, were fated to suffer shipwreck] (Dion. Byz. 77 Ἀνάπλους Βοσπόρου, ed. R. Güngerich, 28, 3, 1927). This text adds to our knowledge of “panoply” used by natives to steer the ships out of their course. These natives were obviously much more resourceful than Xenophon described, and besides plotting out their parcels along the coast, they also used to mislead the ships by deceitful torches. The Timaea tower where the light service had been arranged has already not existed for a very long time as in describing these events the Greek writer uses Past Tense and Dionysios stated the actions of local barbarians as the main reason for terminating the operation of the light tower.

Although rather later than the preceding ones, another evidence is related to what the ancient writers had stated. These are the findings of the French scholar X. Hommer de Hell concerning the sandy beach near Karaburun. He testified that this beach had been covered by ship wrecks. Besides, there were pieces of marble columns (diameter 0.36 m) built in the fortified wall along the coast. It was obviously the tenderest strip for ships approaching from the east and probably the most dangerous spot of the ancient Salmydessos (de Hell 1854-1860).

People sailing in this part of the Pontus could rely on nothing but the supernatural interference of the Heros and it was hardly a coincidence that he had been so popular with Pontic sailors and fishermen. We know of another sea god-patron of shipping (Latyshev 1948, 285, not. 5). The name of the Old man from the Sea is also mentioned in seamen’s folklore of Byzantium. Dionysios of Byzantium identified this deity with Phineus: Μετὰ δὲ τὸ Ἀρχεῖον πολὺς καὶ εἰς βάρθος διερωγῶς ἐπανίσταται κρημνός· προπίπτων δὲ τῇ τῆς ἄκρας ὑπεροχῇ, πρῶτος ἀθρόαν ἐκδέχεται τοῦ πελάγους τὴν ὕβριν ῥοώδει κοπτόμενος θαλάσση· κατὰ κορυφὴν δ’ αὐτοῦ Γέρων Ἄλιος ἴδρυνται· τοῦτον οἱ μὲν Νηρέα φασίν, οἱ δὲ Φόρκυν, ἄλλοι δὲ Πρωτέα, τινὲς δὲ πατέρα Σημύστρας, οἱ δ’ Ἰάσони καὶ τοῖς σὺν αὐτῶν φραστῆρα τοῦ πλοῦ καὶ τῆς ἐκβολῆστῶν στενῶν ἡγεμόνα γενέσθαι. Λακιάδης (?) δὲ τις μάντις <Μεγα-ρεὺς (?)> τὸ γένος ὦν, δίδωσι τὸν χρησμὸν τοῖς ἐπεσσομένοις τῇ

γενέσειτῆς ἀποικίας, ἐξ ἐνυπνίου φαντασίας προειπῶν, ὡς χορὴ θύειν Ἀλιώτῳ Γέροντι καὶ δημοσίᾳ τετίμηται. [After Archeion a high rising and steep rock descending in the depth is standing tall. Protruding at the tip of the cape, it is the first to take up on itself the entire rage of the sea, stricken by its stormy waves. On its top is the Old Man of the Sea. Some claim that this is Nereus, others – Phorkys, some others Proteus, and yet another group – the father of Smystra. There is talk also, that he was the one who gave to Jason and his companions clarifications about the sailing, and was their navigator during the passage through the narrow part of the strait. Some future-teller named Lakiades, <Megarian> by origin, gave to the next generations of apoikoi a vision in his dream, that they must bring sacrifice to the Old Man of the Sea. That is why he is publicly honoured here] (Dion. Byz. 49 Ἀνάπλους Βοσπόρου ed. R. Güngerich, 20, 1927). His function as patron of shipping is rather similar to the one of the Heros. It is hard to find direct parallels between the two deities for the present but it is possible that they had been identical at least during a certain period. Their local origin is beyond any doubt.

Thus we can easily find the reason for the presence of this monument in Ahtopol. Undoubtedly Byzantium was an attractive centre and provided opportunities to inhabitants of most of the sea towns along the West Pontic coast which were situated near the City on the Straits to earn their living. The distance by sea is not too great and probably the relief was a votive offering which a local sailor intended for the sanctuary of the Heros. It is an illustrative example for the contacts maintained in this part of the Pontus in Antiquity.

* An idea of Atanas Orachev, PhD, mentioned in a conversation, has inspired this article, presented to the International Symposium Thracia Pontica, Sozopol 2003.

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FORMS OF EXCHANGE IN BULGARIAN LANDS IN THE SECOND HALF OF THE 19th CENTURY

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ABSTRACT

This essay focuses on the money circulation process in the Bulgarian lands during the last two decades before the Liberation in 1878. A set of facts, published in the Bulgarian and foreign historical literature, has been analysed as to reveal the specifics and peculiarities of that process. The results of the analysis have indicated that in the last two decades before Bulgarian Liberation the circulating capital was mainly money for trade and was owned by few rich Bulgarian families of wholesalers and money lenders. A fraction of this capital was used for trading and industrial activities and money lending at high interest rates. Those were the times when the first attempts to create a regulated credit system were made by the Turkish state as well as by inventive Bulgarian merchants and money lenders, mainly with the purpose to handle the uncontrolled practices of usury. However, the real conditions for the development of the modern type banking in the Bulgarian lands were created not until the first decade after the Liberation of Bulgaria in 1878.

Keywords: Money Circulation, Commerce, Ottoman Empire, Usury

INTRODUCTION

Starting from the XVII century the permanent expansion policy of the Ottoman Empire resulted in serious decline of its economy. The economical and financial crisis reached its pick in the middle of the XIX century. During the second half of the XIX century, the Empire struggled to overcome its economic problems but it could not succeed in creating appropriate conditions to revive its economy and financial system. Meanwhile, resourceful and inventive Bulgarians managed to accumulate capital and invest it in trade, money-lending and industry. These activities were accompanied by the first attempts to found credit institutions around the Empire in assistance of the rich wholesalers and factory-owners.

The purpose of this essay is to review the process of money circulation in the Bulgarian lands in the 1860s and 1870s and to reveal some specifics and peculiarities of this process.

THE ANOMALIES OF THE OTTOMAN MONETARY SYSTEM IN THE SECOND HALF OF THE 19th C.

After the Crimean war (1853-1856) the Ottoman Empire (Bulgaria was within its borders until 1878) experienced a deep financial crisis.

The country was forced to borrow from European countries and banks. Unfortunately, the foreign loans did not bring the expected relief. On the contrary – the disorganization of the state economic system became even deeper. The first loan from London, drawn in 1954, was expected to cover the costs of the war. Not only it did not improve the situation but it was also followed by new loans, which reached the number of 15 during the next 20 years. The loans were drawn under heavy terms and circumstances, and the Turkish national debt increased. In 1873-1874 the budget had a deficit of 4 950 000 Turkish lira; in 1874-1875 the deficit became 5 million Turkish lira. In the same year the foreign debt exceeded 5 billion francs.¹

In addition to the borrowing from Europe, the Empire attempted a number of methods in order to handle the serious financial crisis.

Turkey had adopted the bimetallic monetary system in correlation gold : silver = 1:15 in 1844. The main unit of currency was the Turkish Lira,

¹ *Vek*, year I, No. 6, 16.02. 1874; D. Kosev, 'Polozhenieto na bulgarskija narod predi Aprilskoto vastanie' // *Istoricheski pregled*, year IV, No.2, p.146. See also: A. C. Tuncer, *Fiscal autonomy, monetary regime and sovereign risk: foreign borrowing and international financial control in the Ottoman Empire, Greece and Egypt during the classical gold standard era*, PhD thesis, LSE, 2011.

which contained 7,216 grams of gold. In order to make up for the money deficiency the Empire began issuing paper money. In 1840, during the first years of the reign of sultan Abdulmecit, the first handwritten banknotes, called "Kaim-i Nakdiyye-i Mutebere" were put in circulation. They were introduced to the market with an interest rate with the purpose to be accepted by the population, which distrusted the new type of currency.

Kaime notes were, in a sense, debt certificates or treasury bonds bearing interest rate rather than money. They were not printed, but were handmade and stamped by the official seal. The interest rate on these banknotes was 8%. They were valid for eight years and amounted to 160,000 liras. On the interest due date of the kaime, the sealed banknotes were perforated and at the last payment, the banknotes were returned to the state and destroyed. Because of the destruction practice, today it is extremely difficult to obtain one of these kaimes with interest.

The banknotes were handwritten and soon became an easy object of forgery. People's confidence in them dramatically fell down. That is why, Kaime banknotes were replaced with printed notes in 1842. The new Kaime banknotes were printed in various forms and amounts in denominations of 50,100, 250, 500 and 1000 kurush.² In order to prevent any forgery, merchants used to stamp their own seals on the back of these coupons.

To meet the expenditure of the Crimean War the Empire began to issue a new currency unit, called the "Army Kaime". Thus, various kaime notes were produced for different reasons between 1840 and 1862.

In 1856 the Empire Ottoman Bank (*Osmanlı Bankası*) was founded as a joint venture between British interests, the Banque de Paris et des Pays-Bas of France, and the Ottoman government. In 1863, seven years after its establishment, the shareholders of the Ottoman Bank signed a contract to form the Imperial Ottoman Bank. The bank actually acquired the status of a state bank and was authorized to control the state financial system. It opened branches all around the Ottoman Empire, including the Bulgarian towns of Rouse (Ruscuk, in 1875) and Plovdiv. The Ottoman State granted the privilege of issuing banknotes (kaime) to the Ottoman Bank for a 30 year-period. It was agreed that, within this period

² See: Ş. Pamuk, *A Monetary History of the Ottoman Empire* (Cambridge, 2000).

the government would not issue any banknotes by itself and would not allow any other institution to take up this function. Thus, the kaime banknotes were withdrawn from circulation and in 1863 the Bank issued banknotes for the first time that were convertible to gold on demand and stamped by its own official seal and by the seal of the Ministry of Finance.³ This currency unit was written in 5 different languages which showed the demographic variety of the Ottoman Empire. Maybe this was one of the factors, which explain why the problem with the people's reliance on the paper money remained. The public did not trust those "paper pieces", and did not accept them as units of currency.⁴

When the Russo-Turkish war broke out in 1876 the privilege of the Ottoman bank to issue banknotes was suspended and the government began to issue its own unbacked state notes. In 1880 these notes were withdrawn from circulation and the privilege of the Ottoman Bank was restored.⁵

As a whole, the paper money was in a limited circulation, because it never gained the public credibility. It circulated mostly in Istanbul, with the nominal of 500 lira (£4-5).

Another distinguishing characteristic of the monetary system was the wide range of different currency units and exchange rates. In the different provinces of the Empire the money in circulation differed widely – along with the Turkish silver *mecidiye*, undervalued silver *beşlik* and *altılık*, and *keran*, there was a variety of foreign currency - Austrian *thaler* (Maria Theresa thaler), Russian roubles, French francs and British pounds, which in some places replaced Ottoman currency. There were exchange rate differences between and within the provinces, which the Government tried to control with uneven success by devaluation of some of the units in circulation.⁶

Another interesting fact was that the gold, which was brought into the country, was almost never in circulation. Golden coins would rapidly disappear due to the fact that gold was the only

³ See: E. Eldem, *A History of the Ottoman Bank*, (Istanbul, 1999), p.463-466.

⁴ See: History of Banks, <http://www.tcmb.gov.tr/yeni/banka/history.html>

⁵ Ş. Pamuk, "From bimetalism to the 'limping standard': the Ottoman monetary system in the nineteenth century", in P. L. Cotrell (ed.) *East Meets West – Banking, Commerce and Investment in the Ottoman Empire*, 2008, p.21.

⁶ A. C. Tuncer, *op.cit.*; Ş. Pamuk, 2008, *op.cit.*

medium of exchange that still kept a reputation as a store of value. Thus, in circulation were mainly silver coins, which characterized the monetary system in the Ottoman Empire as silver using, although the base was gold.

Those were some of the anomalies of the Ottoman monetary system. Not being in condition to handle the continuous financial disorder, in 1876 the Empire faced insolvency and declared a moratorium of the loans on an outstanding debt of £200 million.

THE BULGARIAN CASE

The usury in the Bulgarian lands

In order to acquit its debts the Empire had one more resource – the increase of the tax burden upon the population, mostly upon the Christian population of the subdued lands. 80% of the population was engaged in stockbreeding and agriculture. The land was cultivated in a very primitive way; the rural economy as a whole was backward. One of the heaviest taxes was the tithe, which was almost 75% of the rural production. For instance, when the taxes were collected in the town of Rousse in 1870, the collected sum was 36 million francs, of which the tithe was 18.9 million. It means that the tax revenues to the treasury were mainly from the tithe taxation. Apart from the tithe, the Bulgarian population was levied with a number of other heavy taxes.

All these conditions led to the prosperity of the usury.

In the middle of XIX century, it prospered to such a degree that in 1852 the Sultan published a ferman that limited the interest rate up to 8%. The usurer's capital was a twin of the merchant's capital. The large-scale Bulgarian merchants of cattle (dgelepi) and the tax-collectors (beglikcii) were simultaneously merchants and usurers. The same can be said about the rich craftsmen, who were merchants and usurers too. Typical for the loaned money was that it was used mainly for payment or purchase. The usurer's capital at that time had a double function. On the one hand, rather conservative in character, with typically high interest rates, sometimes reaching up to 200% on a loan, it hampered the development of the new financial forms. On the other hand, the usurers with their large sums of money became organizers of the modern and progressive trading activities in the country. They triggered the breakdown of the primitive communal system, because the loan absorbed not only the surplus product but also a part of the necessary product,

thus forcing the small-scale landowners to sell their land and to lose their property. This resulted in the formation of big fortunes in the hands of some enterprising Bulgarians, necessary for the initial accumulation of capital.

In addition, an interesting fact was that the usurers were not only Armenians, Jews and Turks (a fact that was a characteristic feature for the XVIII century money lending in the Ottoman Empire), but also rich Bulgarians, to whose help the Turks often resorted. For example, the allegedly richest Bulgarian merchants and money lenders in the second half of the XIX century were the brothers Evlogi and Hristo Georgievi, whose assets after their death were estimated at the unbelievable at that time sum of 19 million lev. They had real estates and shares around Bulgaria, Romania, Russia and Great Britain. They became extremely famous for their wide-scale charity and donations for the educational, cultural and political movement for liberation. The Georgievi brothers spent much of their life in Bucharest and made considerable endowments for poorhouses in Bucharest and the Bulgarian church in Galats.

Other rich wholesale dealers and money lenders were the Komsievi brothers and Stancho Bradinov from the town of Karlovo, who had a joint business establishment in Istanbul in the 1860s–1870s. The Komsievi-Bradinov firm was not only a merchant enterprise but also had money lending activities. It lent money to merchants from Tulca, Rouse, Thessaloniki. It lent money even to other large-scale usurers and wholesalers like the Tapchileshta brothers, who also worked in Istanbul. The Tapchileshta brothers, whose firm had at its disposal a capital of 5 090 865 grosh that increased every other year, in turn, lent money to Komsievi-Bradinov, too. In all cases the loans were of the order of hundreds of thousands grosh. Another sector of these firm activities were the small bank operations – money transfers in the country and abroad.⁷

The Bulgarian trade balance

The merchant's capital at that time doubtlessly had a progressive role. Back in the middle of the XVII century a lot of enterprising and rich Bulgarian merchants from Macedonia and Thrace began developing trade contacts by exporting wool, cotton, silk, tobacco and furs to Austria and Hungary. These merchants were

⁷ Gandev, H. *Problemi na Bulgarskoto Vuzrazhdane* (Sofia, 1976).

owners of trade bureaus and firms in Vienna – the main dumping place of Bulgarian stocks. There was a large Bulgarian exporting community in Hungary, mainly refugees, who had found home there after the Austrian-Turkish war in the end of the XVII century. The Bulgarian community in Budapest was especially active. In the end of the XVIII century the Bulgarian and Greek colonists in Budapest founded a religious parish, which funded the construction of a huge orthodox church.⁸ In the course of time these merchants began to control the whole export to the German areas, ousting the traditional Dubrovnik trade canals. Hundreds of Christian traders worked in Edirne, Varna, Rouse and Plovdiv among which there were a lot of Bulgarians. Rich Bulgarian merchants from Rouse (Ruscuk), Svishtov and Vidin were probably the sponsors of some Aton monasteries. The famous Emanuil Shishmanoglu from Vidin had extended foreign connections with Vienna, Budapest and Brashov, making big export and import deals. Other enterprising merchants from Karlovo and Kalofer bought furs, large amounts of cotton, wool, silk and exported them to Brashov, Bratislava, Leipzig through Trojan and Svishtov by horse caravans. Another big Bulgarian community from Sofia, Plovdiv and Rouse lived in the Russian town of Nezhin and exported Turkish products to Russia. Some of these merchants had permanent residence in Nezhin, others were non-resident. A lot of them bequeathed to monasteries and churches in the homeland.⁹

Thus, the export from the Bulgarian lands gradually got into the hands of the rich Bulgarian merchants, who were at the same time importers of European products. Accordingly, part of the circulating capital and the high profits from the trade activities were a Bulgarian possession. The minor commissioners and collectors and buyers of goods from the small towns also had profits. They were especially helpful for the foreign firms, which were not acquainted with the local conditions, language, roads and the local exchange rates. This type of commissioners appeared during the activities of the Dubrovnik

⁸ *Ibid*, p.410

⁹ Nikov, P. Vidinskite parvenci, Shishmanoglu // *Izvestija na Istoricheskoto Druzhestvo*, XIII, 1933, p. 131; Irechek, K. *Knjazhestvo Bulgaria*, II (Plovdiv, 1899); Gandev, H. *Faktori na Bulgarskoto Vazrazhdane* (Sofia 1943) p.82-88; Dimitrov, T. *Svedenija za Bulgarskite turgovci ot grad Nezhin v Rusia* // *spBAN*, VII (1914), p.127.

merchants in Sofia, Plovdiv, Edirne, Varna, Tarnovo and etc.

Some profits were gained by the transporters (kiradgii) and the Bulgarian craftsmen – mainly weavers and leather workers. The last ring of the profit chain was the producers – stock-breeders, farmers and hunters. Stockbreeders and hunters were owners of their commodity, but not so was the case with the farmers. In some areas their profits were appropriated by the Turkish landowners.¹⁰

The dead capital

Obviously, almost every social group of the Bulgarian population was somehow included into the process of profit distribution. But those profits had to be secured. The most common way of preserving the money was to hide it somewhere in a safe place, because of lack of credit institutions and because of the constant harassment of the Turks, who wouldn't allow the subdued Christian population to gain high profits. The Bulgarians were forced to disguise their wealth and to demonstrate poverty. That's why their accumulated capital was actually a dead capital, which grew in the course of time but wasn't invested in bigger enterprises. Golden and silver coins were locked in bowls and buried in yards, caves and fields. This practice was so common, that nowadays small treasures are often found during casual excavations. The regional museums often register such finds dated from the XVII, XVIII and XIX century, valuable sets of mainly golden and silver coins – thalers, Dutch leewendalders, Spanish piastra, French ecu, Venecian thalers, Florence and Genoese ducats, English shillings, Prussian and Saxon guldens, Hungarian and Polish grosh, Russian rouble and Turkish piastra and altılık – all of them in numerous emissions.

The finds are localized almost exclusively in the pure Bulgarian villages in the central and western areas of the country, spread evenly, which means that all the parts of these areas were involved in the trade.

The foreign coins, once taken into possession by the Bulgarian farmers, were not any more into circulation. People preferred to keep them as a treasure because of the value of the precious metal and the fine workmanship. The Turkish emissions were less valuable and plain, that is why Turkish coins can be rarely found among the coins of these hidden treasures. The most

¹⁰ Gandev, H. *op.cit.*, p.411.

commonly found coins were of those countries which had passive trade balance in the Bulgarian lands – Austria-Hungary, Prussia, Saxony, Italian states and France with its Spanish piastra (at that time Spain had no trade connections with Turkey). The biggest amounts of gold and silver came from those countries.

The content of those treasures was not of big size. Most of them consisted of 10-20 dozens of silver and 10-15 golden coins, which means that these were minor savings of average rich farmers, a result of their long-year-labour savings. But there are treasures of extraordinary amounts, consisting of dozens of kilograms of silver and gold. Among them can be found female bracelets, earrings, ornaments for head decoration, pendants, which represented unthread female ornaments, consisting mainly of coins. A lot of western travelers at that time describe the curious fact that the Bulgarian young women wore strings of silver and golden coins, as a showcase of their social status and fortune.¹¹

As a result, notwithstanding the constant stream of foreign currency, there was a considerable deficiency of means of payment, which deterred the money exchange in the Bulgarian lands.

The first Bulgarian credit establishments

During the 1860s, an attempt was made to handle the usury in the Bulgarian lands by introducing the agricultural credit. When Mithad Pasha (1822-1884)¹² was appointed governor of the Danube Vilayet, he made special efforts to modernize not only the administrative center Rouse but to organize the construction of infrastructure in North Bulgaria. In 1866, the first railway line from Rouse to Varna was open. Shortly afterwards the other two railway lines were finished off (Tarnovo-Jambol, Thessalonica-Skopie). Also, Mithad Pasha promoted the establishment of the so-called agrarian mutual-aid funds. The first fund was founded in 1863 in Pirost and after 1864 a set of 34 such institutions was created all around the Danube Vilayet by enterprising Bulgarians.¹³ In each region (okolija) there was a fund with the purpose to give loans to the farmers and to provide the municipalities with money

for building and maintenance of schools, roads, bridges, etc. The capital was accumulated through the sale of cereals, collected and produced by the farmers. This capital was farmers' possession. The loans could vary from 100 grosh to 100 000 grosh at 12% interest. The funds were quite active in satisfying the needs of the population for credit at low interest. For example, the funds in Rouse Vilayet had a capital of 14 039 637 grosh. This means that the debt of each family was 150 grosh. In comparison with the usurers' practices these funds had a progressive role, given the fact that the usurers' loans had an average interest of 50 %. In fact the agrarian funds were the first credit organizations in the Bulgarian lands. Up to 1876 the facts suggested that those funds had at their disposal working capital of 66 000 grosh annually.¹⁴

The first credit institution before the Liberation on the territory of Bulgaria, which set the beginning of the organized banking in the Bulgarian lands, was established in Varna in November 1869. It was named "The Bulgarian Trading Society" and its chief activity was to lend money at interest – this was a real credit activity of modern type. Its funds increased gradually and in 1872 it had at its disposal 250 000 grosh.¹⁵

In the last two decades before the Liberation on the Bulgarian lands about 40 joint-stock companies were found including shipping one. There were some failed attempts for establishing Bulgarian banks in Plovdiv and Gabrovo.

CONCLUSION

In the last decades before Liberation the capital in circulation in the Bulgarian lands within the Ottoman Empire was mainly money for trade and was owned by rich Bulgarian wholesalers and money lenders. At that time Bulgarians didn't have their own national unit of currency. Along with the golden Turkish lira, Turkish silver *mecidiye*, *beşlik*, *altılık* and *keran*, there could be found in circulation Hungarian mangers, Austrian florins, Deutsche thalers and marks, Netherlands, Danish and Swedish riksdalers. Besides a lot of silver Russian rouble

¹¹ Izvestija na Bulgarskija arheologičeski institute, I, 1922, p.241; V (1929), p.384; VI (1931), p.316-317; Ganchev, op.cit., 420

¹² Midhat Pasha (1822-1884) - great Turkish reformer and governor of the Danube vilayet (Tuna vilajeti)

¹³ Avramov, R. Komunalnijat kapitalizam : T.II. (Sofia, Center za liberalni strategii, 2007), pp. 348-349.

¹⁴ Jubileina kniga na Bulgarska zemedelska banka 1864-1879-1904-1928 (Sofia, Darzhavna pečatnitsa, 1931), pp. 18, 19, 20, 32.

¹⁵ Natov, M., G. Likov. Balgarskite knizhni pari (Flori-r Publishing House, 1997), p.22.

went into circulation during the Russo-Turkish war of 1877-1878, too. In this wide variety of money the coins, withdrawn from circulation in their own countries, were spread in Bulgaria and caused an additional chaos. Because of the long circulation these coins were seriously eroded and it was very difficult to recognize them. So people knew them only by their size and form and named them direklee, kimlee, Hungarians and so on.

Part of this capital was used for trading and industrial activities and money lending at high interest rates. About 500 Bulgarian merchant enterprises all around the Turkish Empire executed at the same time money lending activities and transactions, and some of them eventually set the basis of the modern banking in the young state after the Liberation.

Another large part of the money in being, mainly foreign golden coins, was actually a dead capital, which was hidden and dropped out of circulation, kept for its value as precious metal and worn as female adornment.

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THE BULGARIAN-TURKISH RELATIONS AND THE FATE OF THE EDIRNE REGION OF THRACE ON THE EVE OF THE FIRST WORLD WAR

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ABSTRACT

In the middle of 1914, Europe is at the brink of collision between the big military-political blocks that have formed the Central Forces and the Entente, which are trying to attract new allies. Balkan countries and Bulgaria in particular are important targets in this race. On the eve and after the outbreak of the conflict, in the summer of 1914, when Sarajevo's attack on the Austro-Hungarian Empire took place, the diplomacy of the Great Powers intensified its pressure on Bulgaria and the Ottoman Empire.

The present study aims to shed light on the relations between Bulgaria and the Ottoman Empire, the actions of the representatives of the young Turks and diplomatic representatives of Germany and Austro-Hungary in Constantinople to attract Bulgaria as an ally, and to show how valuable Sofia became for warring countries in the historical period we are dealing with.

Writing this article, archive materials were used, they are by the Central State / Department Archives (CDA).

Key words: *Triple Union, Central Forces, the Entente, Bulgaria, Diplomacy, Constantinople, Ottoman Empire, First World War;*

INTRODUCTION

The clarification of the policy of the Tsarigrad government, the course of the diplomacy of the Entente and the Central Forces on the eve of the conflict and the beginning of the warfare on the fronts of the First World War is a significant historical issue that is widely spoken in the native historiography.

The issues at stake are a very important part of the broad subject of the great diplomatic game between the two opposing groups in Europe to attract allies into the clash between them. The present study aims to shed further light on how on the eve and in the first days of the 1914 World War, Constantinople seeks to attract Bulgaria as an ally against Greece, as well as attempts by diplomats of Germany and Austria-Hungary to convince Sofia for the benefits of joining the Central Force military-political bloc.

Numerous scientific papers, studies, monographs, memoirs are dedicated to one or another aspect of these problems. They are dealt with in a number of individual and collective scientific papers.

When writing this article, archive materials were used by the Central State Department Archives (CDA).

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As a result of the catastrophically developed Second Balkan (Inter-Allied) War, Bulgaria lost most of the Odrin (Eastern) Thrace. The precautionary offensive of the Turkish army in the summer of 1913, which began only after the invasion of the Romanian troops in northern Bulgaria, had almost no serious resistance. The progress is accompanied by a mass escape of the Bulgarian population to the old borders of the country. The local people who failed to withdraw are relentlessly beaten and killed by Ottoman irregular and regular troops.

Following the Ottoman re-occupation of the Ottoman army and the killing of ethnic citizens carried out in the course of its eradication, the number of the Bulgarian population in the area until recently was quite symbolic. The factual situation was confirmed by the Constantinople Peace Treaty, signed in September 1913, by virtue of which Eastern Thrace (except Malko Tarnovo, Svilengrad and Tsarevo) was returned to Turkey. The situation in Western (Aegean) Thrace, which is formally in the new state borders of Bulgaria, is extremely complex. There, from the summer to autumn of 1913, exists the

so-called Gümürdzhin Republic - a self-proclaimed Muslim state entity. The "Republic" is based on unofficial but serious Ottoman support, refusing to recognize the new Bulgarian authority. [1]

Despite the difficult 1913, Bulgaria did not completely erase East Thrace from its foreign policy interests. To a certain extent, the Adriatic (region of Edirne) continues to be the subject of Bulgarian-Turkish relations. Diplomatic officers in Constantinople and Edirne periodically send reports to Sofia. They contain information about the general state of the area, the relations between the different nations in it, the policy of the Ottoman government.

Despite the fact that Edirne Thracia has been "cleansed" by the Bulgarian population, the fears of ruling young people that Bulgaria has not yet left its hopes of returning the area remain. The emerging "triumvirate" of youth, in which the figures of Enver and Talaat stand out, seek to engage the Bulgarian government in a union with anti-Greek affiliation. One of its benefits is the directing of the Bulgarian territorial aspirations entirely to the southwest - to the occupied by Greeks and Serbs Macedonia. There is constant tension between Turkey and Greece. Both sides are in conflict with the Aegean Islands, who are mutually challenged. For Bulgaria, the rapprochement with the Ottoman Empire is somewhat also an alternative, given the isolation in which the country fell against its other neighbors after the Second Balkan War. [2]

The match between Bulgarian and Turkish interests is largely conditional. In fact, the authorities in Constantinople intend to restore, at least in part, the European possessions of the Ottoman Empire before the Balkan Wars. That is why the idea of an expansion of the Ottoman state towards Thessaloniki, with the corresponding return of Western Thrace, is not new or strange to them.

On June 5, 1914, weeks before the Sarajevo attack, which became the occasion for the outbreak of the First World War, Bulgarian Prime Minister Andrey Toshev sent an encrypted telegram to Prime Minister and Foreign Minister Dr. Vassil Radoslavov. His report contained information that he had spoken to one of the three most influential youth leaders - Defense Minister Enver Pasha.

A. Toshev points out that the Ottoman minister has visited him personally and during his meeting has proposed a joint alliance against Greece, underlining that Bulgaria will thus be

able to return the cities of Drama and Kavala. The diplomat reports that he has carefully dismissed this proposal on the grounds that "this would be possible if we were certain from Romania and Serbia." In connection with this finding, A. Toshev adds that "these two countries are only waiting for one action on our part to attack us, and Bulgaria would be exposed to a certain danger if it intervened in such a war. At the same time, A. Toshev assures Enver Pasha that the Bulgarian government will continue to adhere to the strict neutrality policy in the future. "It is obvious," concludes the authorized minister, "that the Turks are afraid that we will not follow their example with Edirne's reoccupation at some point." Enver insisted that he would "probe" from afar Russian Consul-General Michael Girs if Russia would undertake to withhold Romania from an attack on Bulgaria in order to make use of it for a Greek account in the case of a Greek-Turkish war, while "allowing Serbia to untie something from Greece at the same time." Enver further examined the preparation and status of the Turkish army, its mobilization capabilities, as well as those of its potential Greek adversary. Still, the Ottoman minister expressed the hope that the war could be avoided. Nevertheless, the entire conversation, including the proposal for alliance with Bulgaria, takes place in the context of the current military-political situation - the sharp confrontation between Constantinople and Athens and the possibility of an armed conflict between them. [3]

On July 9, 1914, just over a week after the dramatic events in Sarajevo, A. Toshev sent an encrypted telegram with information and for his meeting with the other most influential young Turkish leader - Interior Minister Talaat Pasha. Talaat insists on a "quick" drafting of a Bulgarian-Turkish agreement, which he thinks is shared by both the other representatives of the Central Youth Committee and the Austro-Hungary Diplomacy and, in all likelihood, Germany. The Ottoman minister points out that if Bulgaria does not accept this proposal, Constantinople will be forced to seek "other political combinations". In order to incite the Bulgarian side to action, Talaat states that only a few months ago, German Chancellor Bethmann-Hollweg advised the Ottoman government to focus on close rapprochement with Greece, but despite these suggestions, the preferences of the young Turks for a possible political and military ally in the Balkans are aimed entirely at Bulgaria.

In his quest to be even more convincing, Talaat Pasha is not bothered to present as an example the painful case for Bulgaria with East Thrace. Considering the increasingly likely possibility of a recent war between Serbia and Austria-Hungary, the Turkish Interior Minister said directly: "As nothing has ever been able to stop us in the reoccupation of Edirne, as we have seen that there are no troops in front of us, so now I am convinced that you will enter the Serbian lands in the first fight between Serbs and Austrians. " "You are most waited in Bitola ..." he continued encouragingly. "We will deal with the Greeks." [4]

At the same time, A. Toshev also spoke with the German ambassador to the Ottoman capital, Baron Hans von Vangenheim. The diplomat tells us that, although hesitant, the baron speaks rather for the benefit of a Bulgarian-Turkish agreement, but at the moment advises Sofia and Constantinople to confine themselves to "exchanging thoughts and postponing it until the outbreak of war if it breaks out ", because in this case the agreement could be reached " in 24 hours ".

The conversation makes it clear that German Ambassador Vangenheim does not believe in the possibility of achieving real convergence and even less in concluding some union between Athens and Constantinople. On the contrary, he believes the two governments are preparing to fight one another. According to his reports, Greece is preparing for a war, which is reported by General Lyman von Sanders (head of the German military mission in Turkey), who told him that in the Ottoman army the feeling of hatred towards the Greeks "was infinitely. "According to the general, in the event of war, the Ottoman Empire could stand up with a 300-thousand-strong army, well-trained and equipped with the necessary supplies" with which old mistakes could not be repeated." [5]

A. Toshev points out to Vangenheim his view that Germany, despite its recent opportunities, does not seem to want Turkey's formal accession to the Triple Union. To this conclusion, the German ambassador, though vivid, replies that, according to him, the accession of Constantinople to the Triple Union would mean the direct push of the Ottoman Empire to war with Greece. Vangenheim also points out that the ruling circles in Berlin prefer Turkey to Greece as an ally, but in any case they should also take into account the close relationship of Kaiser Wilhelm II with the Athenian court. [6] In a summary of his colleague's comments, A. Toshev writes: "It was a

very delicate question at all, which Baron Vangenheim had to touch with great dignity and caution."

At the same time, the German ambassador assures his Bulgarian counterpart that the Reich firmly stands behind the Bulgarian interests and Sofia can always rely on Berlin's support. Of course, these assurances are not meant for the sake of purpose. "After that he asked me - continues A. Toshev - what would be the impression in Bulgaria if one day it is proclaimed Bulgaria's accession to the Triple Union?" A. Toshev cautiously replies that "this will depend on the nature and extent of the benefits that such a combination would provide us with."

The conversation between the two is also about Romania. Vangenheim expressed the view that it would increasingly bring its policy with Bulgaria closer together. In the case of a war between Austro-Hungary and Serbia he does not believe the Romanians stand on the side of Russia (i.e. the Entente) because King Carol I was a German. At the same time, the ambassador fails to recommend thoroughly avoiding border incidents on the Bulgarian-Romanian border. [7]

In his report, A. Toshev also reports that he met "this morning" his Austro-Hungarian colleague, Marquis Palavichini. According to him, there are three possibilities for resolving the crisis with Serbia: 1 / unconditional acceptance by the Belgrade cabinet of all requests that will be made to him by the Austro-Hungarian government. In this case, only Serbia would be humiliated, but the war would be avoided; 2 / neutral behavior of other Great Powers in the event of an armed conflict between Austro-Hungary and Serbia. In this case, "it would be more like a trip"; 3 / Expansion of the conflict. In the third option, the representative of the Vienna diplomacy pointed out, there could be a clash between the two opposing military groups. Considering the last scenario, Palavichini points out that Greece should prevent the Ottoman Empire from joining the Triple Agreement and that in this case an agreement between Sofia and Constantinople would be necessary.

A. Toshev leaves no "pending question" about the risks of such an agreement. In his report, he writes: "On my question, what guarantees can we have that in an agreement with us, Turkey will not want to leave Thrace (it is a matter of Western Thrace) and Macedonia, where it would go its campaign against Greece, the ambassador said that there was nowhere to talk about the future division of territories. If in a

"wider war" war, victory remained on the side of Austro-Hungary and the Triple Alliance, then the latter would "be the lord of the situation, and therefore he would have the definitive word on the new territorial distinctions on the Balkan Peninsula." At the same time, Marquis Palavichini does not conceal the ambitions of Vienna, considering the possibility that the Habsburg Empire itself "would come to Thessaloniki".

According to A. Toshev, it is clear from Palavichini words that Bulgaria and Turkey have to agree on "a common plan of action together with Austria-Hungary" without first securing their "benefits" in case of war. "Of course we do not share this and it is not good for us," Toshev said. - Given the great complications that may occur, it seems to me that the most export-oriented for Bulgaria would be the second option, localizing the conflict between Serbia and Austria [Hungary]. In such a case, Bulgaria has no choice but to demand "the appropriate retribution for our neutrality." [8]

Although, similarly to Bulgaria, the Ottoman government also announced that it would follow the policy of total neutrality, it issued an order for mobilization and took a number of steps, which were more of a preparation for immediate involvement in the war. [9] The measures, especially those in Eastern Thrace, are causing the country's strong concern, given the potential threat of a Turkish invasion of southern Bulgaria. On July 17th, 1914, Bulgarian Prime Minister in Tsarigrad A. Toshev informed the Prime Minister with an encrypted telegram that he had spoken to the great Vizier about the reasons for the partial Turkish mobilization. The first Ottoman minister tells him that this is done on a case-by-case basis, and "mainly for fear of surprise on the Russian side." [10]

The entry of the Ottoman Empire into the war at the end of October 1914 intensified the accounts of Edirne region Thrace, coming through the Bulgarian diplomatic channels. Ever since the early days of the growing European conflict, the Bulgarian government has followed with increasing interest the behavior of the ruling young people and, in particular, the mobilization and movement of troops and military materials in the area. [11]

On November 15, 1914, Adrian-General Advisor Georgi Serafimov sent an encrypted telegram to the Prime Minister and Minister of Foreign Affairs and Religious Affairs Vasil Radoslavov. "After the announcement of the war

between Turkey and the Triple Arrangement," said Serafimov, "there is a clear perception of the Turks' fear of an eventual invasion of the Bulgarians in the Odrin region." Moreover, the involvement of the Muslim empire in the conflict and the choice of allies is far from being endorsed all circles in the army. Many Turkish officers are dissatisfied and openly declare that their wars with both the Russians, Englishmen and the French will have "catastrophically bad consequences" for the Ottoman Empire.

The description, which Serafimov gives of the Turkish army, drastically differs from the German assurances that it is already "exemplary". According to the Bulgarian diplomat, the situation of the Ottoman army as a whole and especially in the Edirne vilayet (region) is "to be pitied". Officers have not received their salary in full for four to five months. Only half the remuneration is granted, provided that the officers' salaries are generally very low. The soldiers are not in a better position. They suffer from cold and malnutrition, despite the coming winter still in their summer uniforms. There is even evidence of suicide due to their plight. There is constant discontent and low discipline in the troops as a result of the poor living condition.

G. Serafimov reports that there were also many "interesting" cases when the goods were requisitioned for the needs of the army. Untimely and inadequate wages forced some of the military officers to indict indiscriminately, then sell the stuff by retaining the sums received for themselves. There have been cases of "very nice and expensive carpets, silk women's socks, even black caviar".

The Consul is categorical that "Greeks, Jews, Armenians, and much of the Turkish population are eagerly awaiting the capture of the Adrianople by the Bulgarians because the anemia from which Edirne suffers from the Turkish invasion weighs on everyone." According to G. Serafimov "no word can be spoken about any trade". Only colonial goods were sold in limited quantities, but because of the fear of requisition merchants generally refrained from doing so. Moreover, the Ottoman authorities have systematically made efforts to modernize the entire Adriatic Vilayet. The policy was personally run by Hadji Adil Bey. The authorities have recently seized an empty place belonging to a Jew, an Austrian subject, in the suburb of Edirne Karaagach. The construction of a mosque and a school has begun on the land. Karaagach was considered a purely Christian part, and the construction of the

mosque was meant to become Turkish. But with this, the case has not yet ended. "But since a mosque can only be built on a place bought or voluntarily deposited," explains G. Serafimov, "those in power begged the owner to give it, for which he was promised rewarding him with a great order (medal) ... Probably he would soon become a benefactor forcibly." [12]

The Consul draws attention, as a direct eyewitness, to the loudly proclaimed recent Sacred War. [13] In Edirne, the rally for her announcement took place last Friday in the courtyard of the Sultan Selim Mosque. Mr. Serafimov wishes to attend and for his astonishment his valia allows. Although he was just an observer, "everyone's attention was directed to me," he writes, further reducing the religious enthusiasm of Muslims present. The consul generally describes the lean and apathetic mood of the crowd in the news of the announcement of the jihad. "I did not notice the enthusiasm that I expected to see in such a rare case for Muslims. There was a general embarrassment, and it seemed as if everybody's face was obsessed the question of "where we are going." [14]

On the eve of the First World War, the relations between Bulgaria and the Ottoman Empire developed in a variable and dynamic way. For Turkey, due to the smoldering conflict with Greece for the Aegean Islands, it is necessary to secure the strategic rear parts in Thrace, the conclusion of a military alliance or convention with the Bulgarian state is a desirable option. Therefore, in a sense, the Ottoman Empire is the active party in this process. But Bulgaria sees an opportunity, through its rapprochement with Turkey, to better resist Greece, Serbia and Romania with a view to the return of Macedonia and Dobrudja. The two formerly warring nations have found convergence points, although there is mistrust between them and many controversial issues. Because of the ethnic cleansing of Edirne region Thrace in 1913, Bulgarian positions there abruptly weakened. However, the Turkish leaders' fears of reoccupation of this region are not a stoppage and are among the main factors driving them to an agreement with Bulgaria. A year later, as a result of the German-led Convention with Turkey, Bulgaria received a small part of the Adriatic-narrow stretch along the Maritza River. [15]

The Compromise is compelling for both parties because it was done within the framework of the Bulgarian state's involvement in the Central Powers war. Even this small part of Eastern

Thrace will be lost under the peace treaties after the First World War.

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- 2. As early as** the end of 1913 - early 1914, options for a military convention were developed between the two countries. It is noteworthy that future territorial benefits, in the event of a possible joint war against Greece alone or Greece and Serbia at the same time, are clearly distinguished. In the draft convention of January 1914 Edirne Thrace was not the subject of discussion that is, firmly regarded as Ottoman. Against the accession of almost all Greek and Serbian Macedonia, Bulgaria is obliged to provide some territorial compensations to Turkey in Western Thrace. The Ottoman Empire crosses all of the Aegean islands except O. Thasos. - **See. Alexiev, K.** A little-known document from the archive of Andrei Toshev about the Bulgarian-Turkish relations at the beginning of 1914 - *In: World War I on the Balkans and Bulgaria's Inauguration in 1914-1915* Collection of papers from the International Scientific Conference, Sofia, 13-16 October 2015, S. 2017, 177-191.
- 3. CDA**, u. 321K, op. 1, ae. 2275, paragraphs 1-2.
- 4. Again**, 8.
- 5. Again**, l. 9.
- 6.** Wilhelm Kaiser's sister is the wife of the Greek King Konstantinos. Until the summer of 1917, when Greece officially entered the war on the side of the Entente, there was a likelihood (albeit increasingly hypothetical) of the country joining the Central Powers.
- 7. CDA**, u. 321K, op. 1, ae. 2275, 10-11.
- 8. Again**, l. 11.
- 9. Bulgarian-Turkish** military relations during the First World War (1914 -1918). S., 2015. Race. M. Kumanov et al., P. 25.
- 10. CDA**, u. 321K, op.1, ae. 2271, paragraph 1
- 11. Markov, G.** The Great War and the Bulgarian Key to the European Wreck 1914 - 1916. S., 1995, p. 52.
- 12. CDA**, u.321K, op.1, ae. 2271,paragraph 18
- 13. The idea of** declaring the Holy War belongs to Germany. The idea is based on the fact that

the Sultan is at the same time a Caliph - the supreme head of the "believers," and as a result of his call, the tens of millions of Muslims from the British and French colonies in Asia and Africa will rebel. In fact, nothing like that happens. The idea is met without enthusiasm by the Muslim

masses, which is confirmed by the observations of the Bulgarian diplomats. Moreover, for the ignorant Muslim, the raging global conflict is a war of "infidels" against other "infidels."

14. CDA, u.321K, op. 1, ae.2271, paragraph 19

15. Markov, G., cit., Pp. 171-172.

THE BULGARIAN-ROMANIAN AND BULGARIAN-RUSSIAN RELATIONS AT THE BEGINNING OF THE FIRST WORLD WAR – A VIEW FROM BUCHAREST

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ABSTRACT

This article aims to shed further light on the events from the beginning of the global conflict that erupted in 1914, in connection with Petersburg's desire to attract Bulgaria and Romania to the military-political block of the Entente, considered in the context of the great-scale European policy and through the eyes of the Bulgarian diplomatic representatives in Constantinople and Bucharest.

The position of opposing forces in the First World War - Russia, Austro-Hungary on the issue of Bulgarian and Romanian neutrality was presented, through their diplomatic representatives in the Romanian and Ottoman capitals. This was done in the context of the diplomacy of the great powers to attract new allies, which is extremely controversial after the Ottoman conflict, as well as to show how valuable Bulgaria and Romania are to the warring parties.

Various researches on the subject and archival sources from the Central State Department Archives (CDA) were used to write the article.

Key words: *Romania, Bulgaria, Russia, Austro-Hungary, Great Powers, First World War, diplomatic moves, neutrality.*

INTRODUCTION

The clarification of Russia's aspirations to attract Bulgaria and Romania to the military-political bloc of the Entente and the actions of the rulers in Bucharest and Sofia is a historical problem which, due to its undoubted significance, as part of the issue of diplomacy, part of the military- The Entente and the Triple Union, is widely spoken in our native historiography.

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

Numerous scientific papers, studies, monographs, documentary and memorial collections are dedicated to one or another aspect of these problems. They are dealt with in a number of individual and collective scientific papers.

This article aims to further highlight the actions of Romanian and Bulgarian diplomacy and the policies of Russia and Austro-Hungary in the first months of the First World War.

This is the time when Bulgaria and Romania have declared that they will maintain neutrality and will not be involved in the outbreak of con-

flict in Europe. Because of their strategic importance, however, they are of interest to the diplomacy of the great powers who have already faced each other in the war.

The main articles on the topic and archive sources from the Central State Archives (CDA) were used to write the article.

* * *

Although the formal occasion for the outbreak of World War I was found in the Balkans (the murder of the Austro-Hungarian Crown Prince Franz Ferdinand in Sarajevo), at the outset of the war, only one Balkan state - the invaded Serbia, supported a little later by Montenegro, is in the position of a warring party. For the other countries on the Balkan Peninsula, the first military months are marked by intensive and versatile diplomatic activity in which the representatives of the Entente (the Covenant) and those of the Central Powers (Triple Union) are equally active.

Regardless of the fact that there is a certain preference for one or the other military coalition, neutrality remains the main position of the majority of the countries in the region. Each of the countries on the Balkan Peninsula is afraid of its

neighbors, which is why it is extremely abstaining with regard to the question of eventual inclusion in one of the warring coalitions. In the Balkan capitals we carefully weigh the risks and possible opportunities for territorial expansion in the event of a participation in the world-revolving global conflict. Mutual suspicions, however, remain at this stage in most of the Balkan states (with the exception of the vast Ottoman Empire which, after the Balkan wars, remained with nil territories on the peninsula) in the category of neutral states. [1]

Romania is also no exception to the general rule. The country is in a tough and somewhat even delicate situation. It managed to expand substantially, with almost no serious effort, as a result of the Second Balkan (Allied War) war of the summer of 1913, mainly at the expense of Bulgaria, and under the favorable gaze of states and its two rival groups, it sought to preserve their newly acquired lands (South Dobrudja). There seems to be a feeling that Romania is permanently gravitating in the orbit of the Central Powers (Germany and Austria-Hungary) and it is a matter of time to join them in the war. The state joined the Triple Alliance as early as 1883, its ruling dynasty was of German origin, which should have given it a definite advantage over its pro-German orientation. On the other hand, however, Romania's national aspirations are increasingly pushing it toward the Covenant camp. The Habsburg Empire shares irresistible contradictions. The main "apple of discord" is the disputed area of Transylvania, populated by both Romanians and Hungarians, but wholly within Austro-Hungary. Romania's relations with some of the countries of the Entente (the Covenant) are no less complex. In the event of joining this group, Bucharest could rely on serious military assistance only from Russia, but with the enormous Slavic Empire there are also many controversial minority and territorial issues - above all for the Bessarabia area.

With the onset of World War I, and more precisely, with the Austro-Hungarian attack on Serbia, Russia's pressure on Bulgaria has increased. In Petersburg they realize that the memory of the Second Balkan War is still too painful, and Bulgarian-Serb antagonism - too strong to reach any alliance between the two Balkan Slavic states. That is why Russia's aspiration is for Bulgaria to remain at least neutral by not taking advantage of the difficult situation and not attacking its western neighbor to return the captured Macedonia.

In an encrypted telegram from July 15, 1914, the Bulgarian Plenipotentiary Minister of Constantinople, Andrei Toshev, told the Prime Minister, Dr. Vassil Radoslavov, that Russian Consul General Mikhail Girs shared his impression that "the correct conduct of Bulgaria makes a good impression." In the conversation, M. Girs said, "The moment is such that Radoslavov may become the most popular political person in Bulgaria". "Without speaking openly," Toshev said, "Girs wanted to make the thought that Bulgaria's corrections to the situation created after the Balkan Wars were possible."

Italian Ambassador Garoni also "more than ever" advised the Bulgarian government to stick to prudent and patient behavior. Any military intervention on the part of Bulgaria could have an unfavorable effect - mainly on itself. A. Toshev relayed the words to his Italian colleague: "In fact, the Bucharest Treaty (ending the Second Balkan War - author's remark.) was torn apart. Time worked fast for Bulgaria" In the Balkans, Garoni saw the main danger of the Austro-Hungarian offensive towards Thessaloniki. [2]

The efforts of Russian diplomacy to learn more about the behavior of the Bulgarian government continue in the coming weeks - all the more so that it gets information about the Turkish-Bulgarian secret talks that have begun. Although they end with a military convention that has never been ratified and does not come into force, these talks are causing serious concern to the Russian side.

In Petersburg, they are also concerned about a possible rapprochement between Sofia, Constantinople and Bucharest - a union that would tend to prefer to the Central Powers rather than to the Entente. In an encrypted telegram of August 16, 1914, A. Toshev told V. Radoslavov that Russian Prime Minister Girs visited him in the morning and told him that, according to his report, Talaat Pasha (one of the three young leaders of the Ottoman Empire) did not succeed in his mission in Bucharest to reach an agreement between Romania, Bulgaria and Turkey. Apparently pleased with this failure of the Youth Initiative, M. Girs states: "A prudent and patient Bulgaria could rely on just vengeance." The longtime and experienced diplomat of the Slavic Empire once again hints at some future territorial compensations for Bulgaria if she refrains from attacking Serbia and remains neutral to the end, but does not say anything concrete. A. Toshev, for his part, once again assured the representative of Petersburg

that the Bulgarian government is firmly committed to maintaining neutrality. He points out to the Russian diplomat that: "To ask Bulgaria to act against Austria for Serbia would mean asking for the impossible." For his part, M. Girs responds that "we cannot ask for anything more now." [3]

The unprovoked Romanian invasion of Northern Bulgaria during the Second Balkan War and subsequently the abolition of Southern Dobruzha under the Bucharest peace treaty put a lasting negative impact on the Bulgarian-Romanian relations as well as on the Bulgarian-Russian relations. [4]

Despite the authorities in Sofia, that Russia will support them in the tough military and political situation in which they have been since the summer of 1913, Petersburg does nothing serious to hinder or at least limit the Romanian invasion. As a result of these Russian actions or inactions, with the outbreak of the global conflict, the Bulgarian government is experiencing certain fears of Romania's accession to the Entente, which is perceived as potentially dangerous for Bulgarian national interests. Therefore, in the first months of war, Bulgarian diplomacy has been trying to establish to what extent Bucharest has bound itself with the Covenant parties, and in particular with the official Petersburg.

On October 8th, 1914, the governor of Bucharest [5] Peter Neykov [6] sent a comprehensive report to the Prime Minister and Minister of Foreign Affairs Dr. Vassil Radoslavov. The report is entirely devoted to Neykov's conversation with the Russian ambassador to the Romanian capital Stanislav Poklewski-Kozel. [7]

P. Neykov confesses that he has deliberately visited Poklewski-Kozel, albeit without a strictly defined purpose. According to the Bulgarian diplomat, he wanted in an informal conversation to find out more about the current state of relations between Russia and Romania and at the same time, if possible, "to guess the feelings of the Russian official world to Bulgaria vis-à-vis at that very moment."

At the beginning of the talk, P. Neykov draws attention to the fact that many in Bulgaria envied our northern neighbor for the situation in which it is. The reason for this is related to Romania's internal and external situation, which implies a much closer future close rapprochement with Russia.

Ambassador S. Poklewski-Kozel, however, is not so optimistic that such a development is possible. He points out that until recently in Petersburg they believed that relations with Bucha-

rest would quickly grow into alliances, but this perspective did not seem very likely at the moment. S. Poklewski-Kozel adds to his reasoning and points out: "The love to Russia in Romania, if it actually existed, arose from the Austro-Phobic movement, which began to spread here after the First Balkan War. This Austro-Phobic movement has just opened the eyes of Romanian state men and allowed them to see the essence of the matter. „Yet you still have prejudices," the Russian ambassador notes, as if to put aside the subject with relations between Romania and Russia.

In response, P. Neykov tries to rebut this finding using the language of Aesop, which is typical of diplomacy, and states: "There are no prejudices in Bulgaria, but there are only fears. These fears are exploited by some circles and by some press, as, moreover, other fears are maintained and exploited by some press in you. I cannot speak about the reasons of one and the other fears, but the fact is that they paralyze natural feelings and often cause undesirable consequences." "

In response, the Russian ambassador notes that he does not know the Bulgarian people's moods towards Russia. He knew only that at present the government consists of people (the liberal cabinet of Dr. V. Radoslavov), well known in Petersburg as sharing Austro-philic. [8]

The conversation between the two diplomats, those who love and those who hate (Philic and Phobic), is not over, but continues in the same style of political zealotry. On the last remark of his colleague P. Neykov, he carefully objects that in Bulgaria "there are no longer any philic and phobic politicians". He points out that all that can be said in this connection is that there are politicians who in their past, by virtue of the tradition of the parties they represent or according to their personal preferences, "are more easily adaptable to one or the other politics".

In the context of the conversation, P. Neykov addresses his Russian counterpart to advise him on how each Bulgarian government today or tomorrow can convincingly convey its good feelings to Russia. S. Poklewski-Kozel responds that there is a way and points out the following: "We do not want you to go side by side with the Serbs. We know this is not possible ". Bulgaria is only required to cooperate with Romania at the moment, "sadly distant," when the latter would be openly involved in the War of the Covenant. The Bulgarian government, according to the Russian diplomat, has to take a clear view from

now on "to cool down the militant aspirations of Turkey, which seems to be „cooking“ something." [9] In response, P. Neykov replies that such behavior may again involve Bulgaria, which has not been prepared, in an undesired war with the Ottoman Empire. To be more convincing, he adds that "our people are afraid of the Thracian fields, which, after all the blood shed there, have taken the people away from Macedonia and from our true people's ideal." S. Poklevski-Kozel points out that Bulgaria does not require war-inductive behavior. "And in any case, you will get compensation," he added heavily, "which will surely satisfy you."

The obvious conditionality and lack of any specificity in the last sentence of the Russian diplomat provoked P. Neykov to argue that „we know nothing positive about these compensations. The simple folk logic tells the following: at the end of a Russian victory there is an increased, extended in territory Serbia. We, who have always followed the principle of nationality in politics, would have nothing against the rise of Serbia if it coincided with the achievement of our popular aspirations. „Our diplomatic representative also points out that Bulgaria is not principally against the enlargement of the Serbian state, but not at the expense of the Bulgarian ethnic territories.

In this connection, S. Poklevski-Kozel finds that "so far nothing positive is promised, and that's a mistake. You must be compensated and guaranteed. „He assures P. Neykov that the forces of the Entente "will soon present to you in a clear and circumspect manner exactly what compensation they think should be given to you. And they will be able to force Serbia to reject and sign the proposal of the Triple Arrangement." [10]

After his meeting with S. Poklevski, the Bulgarian diplomat made some conclusions. Firstly, the Russian ambassador doubts both the recent entry of the hesitating Romania into the war and the successful (for the Covenant) exit from the last military operations in Poland and Galicia. P. Neykov also writes: "Poklevski does not know Bulgaria and the real mood in it. But what he has learned indirectly makes him fear of our raids against Serbia. "

The Bulgarian diplomat continues the analysis of his conversation with S. Poklevski and points out that, according to Russian information, the Ottoman Empire is preparing something and "these real or mischievous intentions of the Ottoman Empire" make Petersburg worry. In the

context of this information, P. Neykov points out that "Russia's readiness to provide us with compensation and the size of the latter are dependent on the coming or retreating Turkish danger."

With regard to Greece, S. Poklevski believes that it will most likely remain unaffected by the World War, will maintain neutrality, and "it is better not to expect any compensation." Only if the Greeks gave all the Epirus could they be forced by the Covenant forces to give Bulgaria a "small border rectification." [11]

The conversation of the governor P. Neykov with the Russian Ambassador S. Poklevski-Kozel shows how difficult it is for the Entente countries to reach a united opinion regarding their potential Balkan allies, and in particular Bulgaria. Beyond the general assurances of giving any compensation to nothing concrete is not enough. England, France and Russia have failed collectively to impose on Serbia a commitment to relinquishing even part of Vardar Macedonia to Bulgaria. No less favorable are the hopes that are being given to the return of South Dobrudja. For both the Entente and the Triple Union, Romania remains a valuable and equally desirable ally, so both coalitions are reluctant to exert any more direct pressure on Bucharest.

The Bulgarian government uses its highly complicated relations with Romania as an argument in favor of its neutrality in terms of increasing pressure to enter the war. This is increasingly felt by the Triple Alliance, especially after Turkey's accession to it and the Austrian failures against Serbia.

In an encrypted telegram of November 22nd, 1914, the prominent minister in Constantinople A. Toshev informed the Prime Minister V. Radoslavov that he was visited by the Austro-Hungarian ambassador, Palavichini. He informed the Bulgarian diplomat that Vienna urged Bulgaria to join the war in the very near future, and expressed dissatisfaction with the fact that we "passed from pretext to the excuse to justify our passive behavior." In response to this accusation, A. Toshev states that it is not a matter of pretexts, but of avoiding rash decisions and points out that if Bulgaria attacks Serbia, it is not insured by a Romanian and Greek assault. The diplomat also points out that, at this moment, Sofia is merely respecting Bucharest, because in Romania they know that if they attack Austro-Hungary, the Bulgarian troops will enter Dobrudja to return it because "there is nothing to be afraid of from defeated Serbia and weak Greece ". Eventually, Palavichini agreed with the argu-

ments of his Bulgarian counterpart. He even trusted him that he was opposed to Turkey's involvement in the war, but he insisted on Vienna and he was forced to act as instructed by his government. Now everyone has seen and understood that Turkey's intervention has further complicated the situation. [12]

After the Second Balkan War, Bulgarian-Russian relations were irreparably damaged. Mutual distrust and suspicion, despite the declaratory assurances of the most heartfelt and fraternal feelings, are emerging as a lasting tendency. For Petersburg the main and only priority is for Bulgaria to remain neutral. The main concern of Russian diplomacy is for Sofia not to succumb to the temptation to attack Serbia in this very difficult situation. Bulgarian-Russian relations are increasingly becoming Serbian-Russian. Withholding the Austro-Hungarian troops, just the price of the "small Balkan ally" of the Entente is rising, while the winning of the Bulgarian state as an ally is definitely left behind, and along with it, the possible Bulgarian territorial gains in Macedonia. With the onset of the World War, the importance of Romania, which, due to its geostrategic position (border with Austro-Hungary, just like Serbia), is rapidly becoming a priority, at the expense of the ever weakening Bulgarian positions before the official Petersburg.

Just one year after the conversation between the diplomats Petar Neykov and Poklevski-Kozel, in early October 1915, Bulgaria joined the Central Powers. Romania retains its neutrality for nearly a year - until the summer of 1916. After long fluctuations and hesitations, and after securing an impressive Russian military aid, though extremely insufficient, the northern neighbor nevertheless entered the war on the side with the Entente. [13] By the end of the war, it will move from a state of complete defeat to - by virtue of the logic of the coalition war - a final winner in the several-year-old global conflict.

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7. **Poklevski-Kozel** was a Russian ambassador to Bucharest between 1913 and 1915. After the October Revolution, he refused to cooperate with the Bolsheviks and remained an emigrant for the rest of his life in Romania.
8. **CDA**, f. 327K, op. 1, ae. 282, para. 150.
9. **At the time** of the conversation, the Ottoman Empire is still formally neutral, but the German military and political influence in it is increasingly intensifying. Two of the members of the young Turkish triumvirate, who ruled the country - Enver Pasha and Talaat Pasha - are supporters of Germany. They succeeded in imposing on their associate, Jemal Pasha, who goes for Anglophile and Francophile. At the end of October 1914, after a long period of hesitation and wait, somewhat oppressed by their German patrons, the ruling youngsters entered the war on the side of the Central Powers.
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ATTITUDES OF STUDENTS - FUTURE TEACHERS - FOR CAREER ORIENTATION AND PROFESSIONAL REALIZATION

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ABSTRACT

The attitudes of students - future teachers for career orientation and professional realization refer to the fundamental problem about the future of the teaching profession in Europe and on a national level. Taken into consideration the established trends of aging of the teachers personnel and the withdrawal from the profession, the issue of determining the factors influencing the orientation towards teaching and the prerequisites for practicing it, is the basis for planning adequate policies for stabilizing the teaching profession. As the observed trends are prolonged and are related to the current socio-economic conditions, the tracking of the motivating and demotivating factors should be continuous considering the specific social conditions.

The article presents the results of a survey of the attitudes of 301 students who are in a process of obtaining a Bachelor's degree in teaching in four Bulgarian universities. The attitudes of future teachers were measured through SWOT analysis. Quantitative and qualitative content-analysis has been used to identify the attractive (motivating) and repulsive (demotivating) factors, which determine the choice and the following realization of the students in teaching profession. The findings give idea about the measures that need to be implemented in order to motivate future teachers to practice the teaching profession in a long term.

Key words: *future teachers, attitudes, realization and retention in the profession*

INTRODUCTION

In 2015, the European Network "Eurydice" published a report titled "Teaching Profession in Europe: practices, notions and policies". The report outlines the following trends for the future of teaching profession on a European level:

- Aging of teachers, which could lead to shortage of staff unless targeted policies for recruiting and retaining newly appointed teachers are implemented.
- The transition from education to working professionals is particularly important and must be accompanied by measures for increasing competence, confidence, and motivation to remain in teaching field.
- Mentoring is one of the most effective forms of motivation and retention of newly recruited teachers in the profession and it is applied in different versions in almost all EU countries.
- Teachers are well aware of the need for continuous professional development early in their career and declare areas where they need improvement. Often, however,

there is a mismatch between the stated needs and the areas they've been offered for permanent professional development.

- More than half of European countries have established national schemes to support teacher mobility.
- The attractiveness of the teaching profession should be assessed based on a number of factors, taking into account their national features. However, as significant factors shall be appointed the relationships within the institutional environment and the approaches for receiving feedback as well as evaluating teacher's work [1].

The described European trends are manifested on a national level in the following aspects:

- Teaching profession is increasingly aging and feminized. There is an imbalance in the age structure of the education system (44.15% of all teachers working in the system are between the ages of 50 and 65, and the young teachers are only 0.61%). The largest share consist of teachers between 46 and 55 years of age (24 265),

followed by those between 56 and 61 (18 951) and those from 36 to 45 years (16 202). Young teachers up to 25 years of age are only 891 [2].

- The educational environment is extremely dynamic and some teachers can not manage with its challenges. Young graduates experience difficulties to adapt and retain in the teaching profession.
- The educational environment is unsustainable and causes frequent professional migration. Because of the socio-economic conditions, different types of professionals are selecting the teaching profession, doing this in a later stage of their professional and personal development or teachers who have left and practiced other professions are reintegrating to the educational system.
- The National Strategy for Development of Pedagogical Specialists provides measures for making available a specialized qualification for mentors [3]. By adopting in the end of 2016 Pre-school and School Education Act [4] and the accompanying Regulation No 12 on the Status and Professional Development of Teachers, Directors and Other Pedagogical Specialists [5], mentoring in Bulgarian educational system is regulated simultaneously as a form of practical training for trainee specialists, a form of support for underperforming teachers and a form of continuing education for adapting and retaining newly appointed teachers in the educational system. On the basis of the above-mentioned normative documents, the State with the support of the Trade Unions and the local authorities, maintains and develops a flexible support system for newly recruited teachers, taking into account the specific educational context as well as the needs of the teachers.
- Teachers have a choice between topics for continuing professional development taking into account their individual needs and the needs of the specific learning environment. Mentees and mentors may also choose important topics for the development of the newly appointed specialist.
- There is a national scheme to support teacher mobility, including through the “Erasmus +” program, which is administered by the Human Resource

Development Center since 2014. The developed funding mechanisms also include mobility procedures for young and newly recruited teachers [5].

The attitudes for choosing and realization in the teaching profession are a proven factor in planning measures for adapting and retaining of newly appointed teachers in the system.

Research regarding the motives for choosing and practicing the teaching profession are performed periodically in Bulgaria. Valuable research has been done in this respect over the period 2007-2008. In general, the findings reveal that students who choose the teaching profession do not show strong motives for their choice, and also that deficits in the subsequent preparation (mostly practical) as well as the negative public attitudes toward the teaching profession often obstruct the effective adaptation to the teaching profession and lead either to a different career choice or to a rapid dropping off from the education system [7, 8].

Of course, for this period of approximately 10 years, which divides these studies from the current socio-economic situation, it will be appropriate to assume that there has been a change in the motivation of future teachers.

The above mentioned provoked the research of student teachers’ attitudes for choosing teaching profession as motives for realization and retention in the profession.

EXPERIMENT

A version of SWOT analysis was used to study students' attitudes. In this case it was used as a self-diagnosis method. Two sets of factors influencing students' attitudes were derived from the SWOT analysis: positive (attractive) factors and negative (repulsive) factors. Quantitative and qualitative content analysis was used to analyze the results.

The qualitative analysis of the produced statements in the subgroups was performed through conceptual merging of statements into categories. Within each category, the most frequently reported statements were pointed out. The qualitative analysis of the produced statements in the subgroups is presented in percentages indicating how many of the respondents in each group have given statements of a particular type. Synonymous ones were reduced. Statements, which are typical for over 50% of the respondents in every categories were subjected to analysis.

The average rank of the category of statements as well as different statements within the category was calculated. The average rank of the statements is an average value calculated on the basis of the rank that the particular meaningful statement holds among the respondents produced by each respondent. Since many respondents have given more than one statement in the same category, the average ranks of some statements are close in value.

The study involves 301 Bachelors as follows: 246 (81.73%) students in majors from Professional field (PF) 1.2 . Pedagogy and 55 (18,27%) - in PF 1.3. Pedagogy of training on ... The respondents are representatives of four Bulgarian universities: University "Prof. Dr. Asen Zlatarov - Bourgas (UAZ), Plovdiv University "Paisii Hilendarski" (PU), South-West University "Neofit Rilski" (SWU) and "Bishop Konstantin Preslavski" University of Shumen (SHU).

According to the chosen major, students from the major "Pre-school and Primary School Pedagogy" are predominant. They are 54.47% of the students surveyed in the field (Table 1).

Table 1. Distribution of respondents training in different majors in PF 1.2 . Pedagogy. Distributed by major and university

BACHELOR PROGRAM	AZU	PU	SZU	SHU	ALL
Pre-and primary school pedagogy	64	44	15	11	134
Pre-school pedagogy	24	34	12	13	83
Primary school pedagogy	29	0	0	0	29
ALL	117	78	27	24	246

Such respondents configuration is favorable for extracting the attitude of students mostly from the most desirable pedagogy major – “Pre-and primary school Pedagogy”, which covers teachers' preparation for two educational stages.

From all students studying for their Bachelor’s degree in Pedagogy, the largest share of respondents belongs to "Prof. Dr. Assen Zlatarov " University - 47.56%.

The age distribution of respondents, who are studying PF 1.2. Pedagogy varies. Although six students did not indicate their age, some eloquent trends were observed. The majority of students - respondents up to 25 years of age consists mainly from first-year and third-year Bachelor’s students - 81.66% . 12,5% is the share of students over 30 years of age from Pedagogy majors, four

of them are over 46 years of age and one between 51 and 55 years of age.

The age structure of respondents shows that Bachelor’s majors attract mostly candidates who have just graduated secondary education or such who have graduated up to 2 years before University. It is also an indicator that up to three years mostly young teachers will enter the Pre-school and Primary school.

The students from PF 1.3. Pedagogy of training on ... covered by the study are considerably less than those from PF 1.2. Pedagogy. In addition, they are from four majors - mainly with a humanitarian profile and are almost entirely from one University (Table 2)

Table 2. Distribution of respondents training in majors PF Pedagogy of training on... Distributed by major and university

BACHELOR PROGRAM	AZU	PU	ALL
History&Psychology	16	0	16
History&Philosophy	3	0	3
Bulgarian Language&History	33	0	33
Lifestyle&Technology	0	3	3
ALL	52	3	55

No matter how scarce the information is (given the narrowness of the sub-group), in the course of the study it will outline a certain trend.

Due to the relatively small number of respondents, almost 64% of students in the PF 1.3. up to 25 years of age, there is no ground for the claim that mostly young people want to be teachers at Pre- and Primary school. It is impressive, however, that even with this limited number of respondents, including 11 who haven't indicated their age, 9 students are over 36 years of age and two of them are over 46 years.

Within the present study, the analysis of the students' attitudes towards the teaching profession is limited to the evaluation of attractive and repulsive factors for the two sub-groups, differentiated according to the professional field PF in which the students are trained.

Such a differentiation is appropriate, as in the two fields the students are trained for different educational stages, which differ significantly in the nature of teachers’ professional activity. That is why there's a great probability students' motives for choosing the teaching profession also to be different. The main difference is that students in the PF 1.2. Pedagogy are preparing for working with younger children and students

and to undertake the overall organization and realization of the educational process in their group / class. While students in the PF1.3. are preparing for lower and upper secondary teachers on particular subjects and eventually being the form-teacher of teenagers and adolescents.

Regardless of the educational level at which respondents are trained, they gave similar in meaning statements for the attractive and repulsive factors. The first important trend, which is observed, is that the number of positive motives exceeds the number of negative ones - both by the distribution of the categories and by the average number of specific statements.

The types of statements concerning the attractive factors can be grouped into four meaningful categories:

- **Love for children** - this category includes statements expressing love and affection for children, positive descriptions of the child's personality, positive influence of the children on the personality of the respondents;
- **Specifics of professional activity** - This category combines statements about the positive aspects of working with children and / or young people, the willingness and ambition of respondents to change the system and contribute to its development;
- **Status of the profession** - the statements in this category refer to the opinion of respondents about the public status of the profession, the working conditions and the nature of the profession itself;
- **Personal motives** - these are statements of an irrational nature, which are an expression of respondents' emotional awareness for the teaching profession.

Repulsive factors are grouped into three categories, which match three positive factors categories but express the negative attitude of the respondents:

- **Specifics of professional activity** - grouping statements regarding the negative aspects of interaction with subjects in the educational environment (children / pupils and parents); institutional factors that prevent the teacher from being effective in performing his / her duties;
- **Status of the profession** - this category of statements again expresses respondents' opinion about the social status of the

profession, the working conditions and the nature of the profession itself;

- **Personal motives** - contains statements describing disturbing and stressful notion of future teachers about the educational environment.

RESULTS AND DISCUSSION

Bachelor's students studying PF 1.2 have marked an average of 3.67 attractive factors statements, while for repulsive - 2.24.

Bachelor's students from PF 1.3 Pedagogy of training on... have marked an average of 2.76 positive statements and 1.88 - negative.

Table 3 shows the percentage of Bachelor's students from the Faculty of Pedagogy who have registered the relevant factor and its average rank.

Table 3. Attractive factors for Bachelor's students from PF Pedagogy (% of respondents and average rank of the statement)

№	ATTRACTIVE FACTORS	%	Average rank
I.	Love for children	98	1,14
1.	adore/love children	95	1,17
2.	love to engage with children	92	1,28
3.	children motivate me	83	1,65
4.	children are honest	71	1,52
5.	children are good	67	1,36
6.	children are interesting, funny	62	1,54
7.	Children inspire me	58	1,68
II.	Specifics of professional activity	91	2,17
1.	working with children	90	1,24
2.	contributing to education improvement	84	2,68
3.	contributing to system modernization	77	2,44
4.	opportunities to pass on experience	74	2,20
5.	motivating children	71	2,31
6.	upbringing of children	69	2,71
7.	educating / teaching children	59	1,87
8.	contributing to children's development	53	1,96

III.	Status of the profession	83	2,41
1.	stability of the profession	78	1,89
2.	plenty of non-working days, vacation, holidays, days off	76	2,28
3.	good / stable remuneration	69	2,54
4.	secure job	67	2,31
5.	prestigious, respectful profession	67	2,03
6.	good working environment	62	2,46
7.	motivating profession	56	2,25
8.	creative profession	54	2,89
9.	receiving and giving positive energy, emotions	51	3,12
IV.	Personal motives	81	2,46
1.	a dream	81	2,14
2.	qualities for a teacher	74	3,18
3.	example from mother / grandmother / teacher	72	2,97
4.	feeling useful	71	3,06
5.	rejuvenating the system with young teachers	68	3,13
6.	helping people	66	3,25
7.	development and improving	57	3,32
8.	being respected and being thanked	52	2,89

It is obvious that the attractive factors categories are distributed proportionally by quantity and average rank. The category "Love for Children" is most common and it is present in 98% of respondents' statements in this group. The average rank of different statements in this category is 1.14 - i.e. they are indicated primarily in the first place (Table 3).

The next category by number of references is "Specifics of professional activity". 91% of Bachelor's students from PF 1.2, have declared statements from this category and the average rank of different statements is positioning the category around second place (Table 3).

The "Status of the profession" category is the third most significant according to the respondents who gave statements within its

frame. Its average rank is between the second and third place (Table 3).

Personal motives expressed 81% of respondents in the sub-group making the rank of statements in this category equal to the "Status of the profession" category - between second and third place (Table 3).

Out of the categories, according to the number of respondents, the attractive factors are ranked as follows (the summary includes statements indicated more than 80% of respondents in the subgroup):

1. Adore / love children - 95%
2. Love to engage with children - 92%
3. Work with children - 90%
4. Contributing to education improvement – 84%
5. Children motivate me – 83%
6. A dream – 81%

As it appears, the most common motives for choosing and permanently practicing the profession among Pedagogy Bachelor's students are: the attachment to children, the desire to work with them and the ambition to make a change in the educational system by personal contribution.

Regarding the priority of the motives in students perceptions, among the statements put in the first place by the majority of respondents in this subgroup are only those related to the desire and the personal need to work with children:

1. Adore / love children – 1,17
2. Working with children – 1,24
3. Love to engage with children – 1,28
4. Children are good – 1,36

96% respondents from the sub-group preparing for subject teachers have indicated statements in "Specifics of professional activity" category. The motives related to the professional activity of the teacher are the most important for the future subject teachers as they occupy the first place among the other factors (Table 4).

Table 4. Attractive factors for Bachelor's Students in PF Pedagogy of Training on ... (% of respondents and average rank of the statement)

N_o	ATTRACTIVE FACTORS	%	Average rank
I.	Specifics of professional activity	96	1,18
1.	working with children/ adolescents	96	1,08
2.	educating / teaching children	89	1,38

3.	opportunities to pass on experience/ values	83	1,46
4.	contributing to children's development/ adolescents	76	1,88
II.	Status of the profession	93	1,46
1.	good working time	88	1,68
2.	good realization	74	1,54
3.	good working environment	58	1,16
III.	Love for children	86	1,26
1.	love children	86	1,26
IV.	Personal motives	82	2,24
1.	opportunities for development	78	2,12
2.	feeling useful	72	1,86
3.	example from mother / grandmother / teacher	61	2,16
4.	a dream	52	2,52

In the category "Love for children", only one statement was indicated, which almost coincides with the name of the category. It is mentioned by 86% of respondents in the subgroup but it takes leading places according to their references (Table 4).

The Status of the profession is important for 93% of the respondents in this subgroup, mainly identifying it by: good working hours, the possibilities for good professional realization after graduation and the advantages of the working environment (Table 4).

Personal motives are important for 82% of respondents in the subgroup but they are not significant, given that the statements in this category are mainly indicated secondly (Table 4).

The five leading positive motives for students, future lower and upper secondary teachers, are mainly in the aspect of teaching and educating children and young people as a function of the teaching profession as well as more flexible working hours:

1. Working with children/ adolescents – 96%
2. Educating / teaching children – 89%
3. Good working time – 88%
4. Opportunities to pass on experience/ values – 83%
5. Love children – 82%

The main motivating factors are the essence of the teaching profession and the good working environment:

1. Working with children/ adolescents – 1,08
2. Good working environment – 1,16
3. Love children – 1,26
4. Educating / teaching children – 1,38
5. Opportunities to pass on experience/ values – 1,46

The repulsive factors are presented with more compact statements by the Bachelor's students from majors in PF 1.2. Pedagogy.

What is interesting about the content analysis is that there is a difference in the ranking of categories according to the number of statements indicated in them and the average rank of the category (Table 5).

Table 5. Repulsive factors for Bachelor's students from PF Pedagogy (% of respondents and average rank of the statement)

№	REPULSIVE FACTORS	%	Average rank
I.	Status of the profession	96	1,66
1.	lack of prestige in society	92	1,24
2.	inadequate remuneration	89	1,15
3.	disorder in the education system	74	1,92
4.	interference with the teacher's work	68	1,87
5.	poor working conditions	53	2,03
II.	Specifics of professional activity	88	1,90
1.	aggressive children	88	1,10
2.	misunderstood / arrogant parents	88	1,21
3.	too much documentation / bureaucracy	86	1,93
4.	great responsibility / stress	76	1,53
5.	difficult teaching content	62	2,15
6.	working with specific groups of children / pupils (SEN, minorities)	58	2,18
7.	excessive control	53	2,05
III.	Personal motives	78	1,54

1.	relationships in the team/ with colleagues	76	1,12
2.	non-acceptance / misunderstanding in the team	72	1,74
3.	lack of experience	51	2,01

The category “Status of the profession” in the negative sense is the first category both by the percentage of indicated statements in its context - 96% and also the average rank of statements - 1,66 (Table 5).

The difference is between the other two categories. Although “Personal motives” are indicated by smaller percentage respondents in the subgroup - 78% (compared to the “Specifics of professional activity” category, where the percentage is 88), the average rank of statements in this category is ahead - between the first and second place. The rank of statements in the “Specifics of professional activity” category sends them steadily around the second place (Table 5).

The five demotivating factors, expressed by over 80% of the respondents from PF 1.2., are mainly factors of the increasingly complicated educational conditions, in which the teacher works - aggressive children, disagreements with parents and bureaucracy of the system:

1. Lack of prestige in society – 92%
2. Inadequate remuneration – 89%
3. Aggressive children – 88%
4. Misunderstood / arrogant parents – 88%
5. Too much documentation / bureaucracy – 86%

The respondents who have shown dissatisfaction with the public lack of prestige of the profession and the inadequate pay of the teacher's work, are mostly accentuating to the second, marking it among the leading places in their references. Much more demotivating in teachers' view is the unhealthy relationships causing tension in the teacher's activity - those with children, parents and colleagues:

1. Aggressive children – 1,10
2. Relationships in the team/ with colleagues – 1,12
3. Inadequate remuneration – 1,15
4. Misunderstood / arrogant parents – 1,21
5. Lack of prestige in society – 1,24

For the Bachelor’s students from "Pedagogy of training on...", the leading demotivating factors are only six, most of them in the “Status of the profession” category. This is due to the fact that the rest of the statements have been indicated by 50% of the respondents in this subgroup.

Furthermore, in this subgroup the average number of negative statements is 1.88, and much of the statements are overlapping in meaning (Table 6).

Table 5. Repulsive factors for Bachelor’s students from PF Pedagogy of training on... (% of respondents and average rank of the statement)

№	REPULSIVE FACTORS	%	Average rank
I.	Specifics of professional activity	92	1,12
1.	aggressive children	90	1,16
2.	misunderstood / arrogant parents	88	1,08
II.	Status of the profession	86	1,56
1.	low remuneration	82	1,15
2.	lack of prestige in society	76	1,38
3.	disorder in the education system	54	1,27
III.	Personal motives	62	1,62
1.	relationships in the team/ with colleagues	62	1,62

Although with two distinct statements, the “Specifics of professional activity” category is the leading category. The statements definitely cover the problems of interaction between the teacher and the two main subjects of his activity - parents and students (Table 6). And here, with no difference from the other respondents, children / pupils are described primarily as aggressive, and parents - with inadequate communication and arrogant behavior. The second most important category in the perceptions of students from PF 1.3 is described by 54% of the respondents as Disorder in the education system (Table 6). The significant difference from the other respondents is that the statement "inadequate remuneration" here is definitely described as "low remuneration".

Personal reasons concern primarily relationships with colleagues from the professional community.

Thus, the three most frequently mentioned by the students from PF 1.3. negative factors are:

1. Aggressive children / students – 90%
2. Misunderstood / arrogant parents – 88%
3. Low remuneration – 82%

Regarding their rank in the perceptions of the students - future lower and upper secondary teachers, the same three factors are leading, but the respect for the profession also stands out:

1. misunderstood / arrogant parents – 1,08
2. low remuneration – 1,15
3. aggressive children / students– 1,16
4. disorder in the education system – 1,27
5. lack of prestige in society – 1,38

As a result of the conducted research, it can be said, with a great deal of certainty, that over the past 10 years the negative tendency of pedagogical (teaching) specialties to attract student-candidates who have not succeeded in their ambitions for others - "more prestigious" specialties has been overcome. A deeper study would probably prove that the choices of candidates for teachers vary between majors in pedagogical fields. The results of the presented study show that this is due to the "improved" working conditions and the general stabilization of the teaching profession.

The specific findings of the study lead to the general conclusions that the attractive factors exceed the repulsive ones several times. It should be marked that the repulsive (demotivating) factors are described by almost all respondents objectively and accurately. They are identical to the often discussed problems both by experienced teachers and by the general public:

- Contemporary children who are increasingly arrogant and aggressive;
- Parents who show misunderstanding, arrogant and disrespectful attitude towards the teacher;
- Weak public prestige of the profession;
- The inadequacy of remuneration compared to the pressure and responsibility of the profession;

- Strong and ongoing bureaucracy of the profession;
- Relationship with colleagues, non-acceptance by the team;

This shows that the respondents are proceeding to the profession consciously and are identifying future difficulties in order to overcome them rather than abdicate from the profession.

The positive motives of students for whom the teaching profession is the first chosen qualified profession are very impressive. They are emotionally replete, focused on the child and young people. The general context of the motivating factors given expresses optimism about the future by recognizing one's own personality as an active participant in the positive change.

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MONITORING OF MONTESSORI ENVIRONMENT/OBSERVING/ AND PRACTICAL PREPARATION OF FUTURE TEACHERS

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ABSTRACT

Observation in a real learning environment is part of the practical training of future teachers. During the academic 2017-2018 year, the elective discipline "Education by the Montessori method" was included in the curriculum of "Pre-school and Primary School Pedagogy". Through observation in Montessori-environment students have opportunities to form pedagogical observation as a significant professional-personal quality. This study includes 70 students from the pre-school and primary school pedagogy program, full-time and part-time form of education, Bachelor's and Master's educational degree. Observations were conducted in March-April 2018 at "Dr. Maria Montessori" private primary school - Burgas.

Key words: *monitoring, Montessori-environment, pedagogical observation, pedagogical system, practical training*

INTRODUCTION

Observation is part of the practical training of future teachers. It includes monitoring and analysis of pedagogical situations, lessons and other organizational forms in basic educational institutions under the guidance of a lecturer from a higher school.

Observation as a method of research and diagnostics is widely used in pedagogical theory and practice. On the other hand, it is a basic method in Montessori pedagogy. One of her ultimate advice to teachers is: "Watch and analyze!" The inclusion in the curriculum of the specialty "Pre-school and primary school pedagogy" of the optional subject "Montessori Education" creates prerequisites for future teachers to conduct observations in the Montessori environment. This gives them the opportunity to compare, analyze, enrich their experiences by comparing classical and reformist ideas. In this way, observation is present in various aspects - diagnostics, training, development, self-improvement. It helps for higher quality of practical training for future teachers and forms their pedagogical observation.

According to St. Zhekova, pedagogical observation is a necessary professional-personal quality of the teacher. Its main ingredients are selectivity, impressiveness and insight. Selectivity is the ability of the educator to focus their attention and to choose only those details of the

situation that give them the most information about the real situation. The impressiveness is their sharp perception of significant facts and traits of the character and activity of the students. The insight is the ability of the educator to understand the essence of phenomena, to predict their change and development. The good teacher constantly monitors and analyzes to reach the invisible and hidden. For this, however, they shall learn to do so [1].

There is no doubt that monitoring in a real learning environment is part of the practical training of the students and one of the methods for forming their pedagogical observation.

The process begins with the development of a theoretical model of the observed processes and their main characteristics. Students' attention is directed to the main components of the Montessori pedagogical system - Child, Environment, Teacher. The child with their needs and interests is at the center. Still it is a person from the moment of birth; each person is a unique phenomenon. The student develops freely, according to their own inner impulse, they build themselves by interacting with the environment.

The environment contains prerequisites that turn the rules from outside into inner student's rules. It provides children with freedom for their actions and is specially prepared by the teacher. The environment is divided into zones that have a certain sequence - exercises for real life, sensory, mathematics, native language and cosmic

upbringing. Through Montessori didactic materials, the child self-regulates and works on improving their actions through the necessary number of repetitions of the exercises. This makes control of the teacher unnecessary.

The teacher in the Montessori system differs from the classical teacher. They are partners and helpers of the children, they teach a little, they monitor more and manage pupils' own activities. Their time is dedicated both to general leadership of the alumni and to the individual activities with them. The teacher helps them organize their activities and find out how they work to maximize their own potential. The child chooses the place where he / she will work, the didactic material and the duration of the work with them, and the teacher is the mediator between him / her and the environment.

In the Montessori-based education system, the groups are from children of different ages. She thinks this is closer to life. In natural conditions, children play together, driven by interests rather than by their age. They learn from each other by exchanging experience. According to Montessori, upbringing is an aid in the psychological development of the alumni. It does not need rewards and punishments because the first enslaves the spirit and the second is repressive.

These theoretical statements are at the heart of the observation at "Dr. Maria Montessori" private primary school - Burgas. It is the first Montessori school in Bulgaria, licensed under MES/Ministry of education and science/Order № 14-22/08.04.2014. It implements training through:

- Compulsory general educational minimum, which is part of the MES program.
- Interdisciplinary curriculum tailored to the pedagogical system of Dr. Maria Montessori, focusing on the importance of experience and sensory-based learning to generate interest in the classroom and life outside.
- Individual pace of education for each child and the possibility of in-depth study of an optional subject.
- Additional classes in English, Music, Fine Art, Project Activities [2].

"Dr. Maria Montessori" private primary school is an innovative school, included in the Bulgarian Innovative Schools Network.

EXPERIMENT

The study aims to explore the students' expectations for Montessori-education and their ability to observe in Montessori environments. The main methods of the study are observation, lec-

ture, essay "What I expected to see and what I saw at " Dr. Maria Montessori" private primary school- Burgas, analysis of texts from Montessori works, translated into Bulgarian.

The study ran in March-April, 2018.

RESULTS AND DISCUSSION

The study includes 70 students of Pre-school and Primary school pedagogy specialties, full-time and part-time form of education, Bachelor's and Master's degree. The main motivation for their interest in Montessori pedagogy, which is stated in the optional discipline, is curiosity, searching for the different in a professional plan and a desire to be a different kind of teacher who does not resemble the teachers from their student memories. To the question, "What would you like to leave in the past from your school life?", students gather around the following statements:

- some of the methods of punishment and evaluation associated with repeated and pointless writing or copying of texts;
- the lack of space and movement in the classroom, the suggestion and the feeling that only the order is the place for the student;
- boredom in some classes and lessons due to the sophisticated content or apathy of the teacher.

The experience of secondary school students related to the disadvantages and failures of teachers encourages them to look for the new, non-traditional methods.

After acquainting with the main theoretical formulations of the Montessori pedagogical system and immediately before the observation, the students identified themselves in three groups: supporters, skeptics, neutral. The first group was the largest number of participants - 43 students. They accept Montessori's pedagogy as a world model / sample that can change the contemporary Bulgarian education in a positive way. The group of supporters also turned out to be seven students who had previously learned of Montessori pedagogy. They find it accidentally, looking for answers like present and future parents. It is a fact that these people are turning to Montessori pedagogy as parents who have a health or education problem with their child, and the classical pedagogy does not help them. This is not unusual. Practice shows that many of the founders of educational Montessori-institutions first show parental interest, and then builds on professional interest in Montessori's views.

This group of students' expectations for monitoring in the Montessori environment are specifically related to seeking answers to the questions:

- What are the responsibilities of the Montessori - environment teacher ?
- How does Montessori-pedagogy "Help me cope alone" work?
- What are the dimensions of the principle of freedom discipline?

The group of skeptics included 10 students. They openly doubted and did not accept some of Montessori's views:

- children's right to choose what to do at school;
- full use of school time;
- lack of school bell system;
- free movement of students in the classroom.

The remaining 17 students did not show a personal attitude, an attitude towards Montessori pedagogy. They identified themselves as neutral.

Immediately before the observation, all participants joined in their expectations of originality and uniqueness of Montessori-pedagogy. Future teachers are categorical that it is "a different pedagogy." Students look for differences in Bulgarian conditions through comparisons between traditional and innovative schools, between government and private education, between frontal-group and individual-independent learning.

At the question "How do you imagine "Dr. Maria Montessori" private primary school as an innovative school?", the study showed that students' attitude is for " children, working on tablets, look at the interactive board and a teacher who guides the educational process almost as a conductor". 80% of surveyed people associate innovation in education with new technologies, although they are theoretically aware of the Montessori didactic materials that are not related to these technologies. 20% of the students expect the innovations at the "Dr. Maria Montessori" private primary school to be related to the adaptation of Montessori-pedagogy to the Bulgarian educational system, especially in the development of didactic materials for the Bulgarian language teaching at an early stage.

All future teachers participating in the survey have very high expectations for the learning achievements of private school pupils. According to them, these children know and can do much because they are subject to special attention by teachers and parents. For the students, it is natural the invested financial resources, good material facilities, individual work of the teacher and the pupil to result in higher school success.

On the other hand, observers specifically expect students to have difficulty planning their activities in the Montessori environment, unable to make responsible choices, and focus on what is easy, not what is needed for learning. 47 of the surveyed persons have the attitudes to observe:

- a classroom with a common child's noise;
- a teacher who teaches entertainingly and interestingly;
- pupils who have freedom of choice and movement.

According to the students, Montessori environment observation should specify Montessori's pedagogical theory by demonstrating this method of learning and giving assurance to future teachers that processes in educational practice are happening as they are explained in a theoretical sense. The essays presented, based on the observation, show that all students are impressed by the way students meet before the class starts. They describe in detail how the teacher welcomes every child at the entrance to the school, greets the parent and the child, and shakes hands with them. Students' reflections are in the direction of the benefits of this act of respect. In their view, this is not only a proof of the willingness of the participants in the educational process to communicate, but it is the concern of the adults to create an environment in which the child feels comfortable and confident, to build trust and mutual respect among all participants in the educational process.

Secondly, in their observations and essays students pay attention to the setting in the classroom. They find for themselves one of the most common definitions of Montessori pedagogy as "pedagogy of the environment". Future educators emphasize that everything in the classroom matches children to the smallest detail. They describe it as "beautiful, cozy, accessible to children, colorful, smiling, aesthetical, interesting, unusually arranged". According to the Montessori students, the environment is close to the family, the children are relaxed and friendly. They pay special attention to the rules that are written in positive form. According to the observers, the constant involvement of the students through different activities, the calm and serene communication with the teacher are prerequisites for their observance. Didactic materials are accessible, real, recognizable by children. There is an order in the relationship, time and action in the classroom. This reveals the professional observation of future pedagogues. In practice, they turned their attention to the Montessori pedagogy-

ical system and focused their attention on the main components they presented in the essays.

It is no coincidence that future educators pay special attention to the teacher and the pupils. They define the Montessori teacher as "a highly educated professional, mentor and learning assistant". Through their eyes, the teacher is "smiling, serene, patient, calm, delicate, attentive, watching." Professionally envied them for the work environment and are impressed by their workplace. It is interesting to note that it does not differ from the workplace of the students and creates a sense of equality and partnership of all participants in the educational process.

According to observing students the pupils are:

- "relaxed, friendly, balanced; "Responsible because they have freedom of choice";
- "self-sufficient, as adult help is dosed";
- "focused on improving their own results from yesterday;
- "directing their energy to what is interesting to them, because they are not placed within frames and limits;
- "a challenge for the teacher who, for a long time, was only sitting on a desk".

From the observation in the presented essays the students bring out the following characteristics of the Montessori environment:

- few classes, joint training of children from the preparatory group and first grade;
- the right to choose didactic material and workplace from students;
- Discipline, freedom and equality of students, genuine desire to work;
- Atmosphere, individual approach, motivation to learn;
- error control - children themselves discover and correct their mistakes and thus develop will, patience, observability;
- students' learning achievements are not compared to each other, and each compares to what they have achieved the previous day;
- the teacher is smiling and friendly, speaks calmly and tenderly; they are good role models, an assistant to the children, an intermediary between the environment and the children.

As conclusions in the essay, students offer their original definitions of Montessori pedagogy:

- "a plot of difference with the child as the main character";

- "the key to the development of the child";
- "good practice, not a promise of reform with an unknown end";
- "a reality that forms self-control, self-discipline and self-confidence".

It is particularly valuable that the observation opened up the senses of future pedagogues and in the essays they presented they describe some of these states: "I heard silence," "I saw beauty," "I felt faith, love and respect for the child."

It is fair to note that ten of the students and essays express their disagreement with the lack of a school bell system with the beginning of the classes. They definitely do not accept the sitting of the students and the teacher in a circle on a carpet, the first question of the teacher: "How did you spend yesterday?". In their view, this is not healthy, it adversely affects the child's position, does not help to concentrate students on work.

In order to enrich their knowledge after the observation and before writing the essays the students were given the task of acquainting themselves with a book of Montessori translated into Bulgarian. By their choice, they had to present a passage to support what they watched at the "Dr. Maria Montessori" private primary school. The book that prompted their interest is "The Secret of Childhood" (publisher "Asenev-tsi", 2017). Despite the condition of the task, students showed much more interest in the "Miracle Montessori" (Timoshenko, El., 2015) and "The Montessori Madness" (Eissler, Tr., 2018).

They have identified these books as more accessible and closer to them in their understanding of the Montessori pedagogical system.

Montessori observation, writing essays, analyzing texts from and for Montessori pedagogical ideas undoubtedly enriched students with knowledge and skills. They went through situations of doubt, searching for arguments, asserting a personal position. Montessori's pedagogy proved to be an effective means of forming professional attitude and opinion. The unity between theory and practice is a proven way for successful professional training for future teachers.

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MAIN REASONS FOR DELAYED PARENTING

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ABSTRACT

There is a tendency to increase the age of women who get pregnant and give birth to their own children. The reasons for postponing parenting are many and different in nature. It should be known, however, that this is a problem that affects the whole of society because it has a direct connection with demographic crisis and parenting as a whole. That's why this article discusses some basic reasons for choosing a woman to give birth to her child after 35th anniversary and taking all the risks that arose from her decision. It must be clear that this is not an attempt to criticize these women at all. This article is an expression of scientific interest in the position of the woman who decides to get pregnant in older age, although she is aware of the possible risks of pregnancy and childbirth, as well as the possible difficulties in raising and educating the child, and the necessity of social support in this enterprise.

Key words: *delayed parenting, reproductive medicine, pregnancy, childbirth, social support*

INTRODUCTION

The role of the woman to be housewife, to give birth and to raise children is no longer much essential in our time. A contemporary woman has an extraordinary presence in society and public life. In result, the creation of a family is not always her top priority, especially at an earlier age (before 30). Female representatives are studying, working, developing, looking for a suitable partner and creating a family when they feel ready for it. A modern woman has high demands on herself and prefers to be able to take care of herself and then of someone else like a child for example.

In the last two-three decades, there has been a remarkable change in the demographic characteristics of the industrial world, including the increasing age of women who have recently given birth (*Simchen, Yinon, Moran, Schiff & Sivan, 2006*). Nowadays postponed parenting can be considered as a phenomenon on a global scale: the last 30 years have seen the following: a decrease in birth rate and an increase in the birth age of mothers. Various factors are a prerequisite for such a scenario. For example, this is strong presence of women in the labor market; enhancement of professional career and education opportunities, and progress of reproductive medicine and contraceptive

methods with a view to successful family planning. It should be emphasized, however, that maternal age is considered a risk factor in pregnancy (*Aldrighi, Wall, Souza, Cancela, 2016, p. 510*). Studies have shown that not all women are aware of the potential risks. There are women who, due to their advanced age, are subject to too much attention by doctors, which may further stress them and eventually lead to an unsuccessful end of pregnancy. It is important to emphasize that when a woman makes such a decision, it must be well thought out, not just a random idea. As long as this is not a very easy path for passing through, the woman needs adequate social support to cope with challenge and give the society another member. Such support is lacking in the social policy of the Republic of Bulgaria, which is approaching our country with one more step closer to the demographic crisis.

EXPOSITION

Serious measures must therefore be taken, especially since the trend of postponed parenting is expected to last and the number of these women increases. According to the Updated National Strategy for Demographic Development of the Population in the Republic of Bulgaria

2012-2030 the reasons for the postponed motherhood are numerous and interrelated, but the most important ones can be identified as follows:

- ✓ **Economic** – striving for women's economic (profitable) autonomy and fear of falling into dependency at a time when they are most vulnerable (the birth and taking care of the little child);
- ✓ **Educational** – completion of high educational levels;
- ✓ **professional and career** – promotion in the profession and career advancement;
- ✓ **socio-psychological** – the presence or lack of an appropriate partner;
- ✓ **availability of an independent home;**
- ✓ **availability of accessible services for raising, educating and supporting the education of children, etc.** [5].

Economic reasons.

The age, education, profession and economic characteristics of the two partners have the strongest influence on the (one more) child's birth intentions. The more educated and the better-being are more likely to choose the model of the later transition to parenthood, which applies to both sexes [2]. Naturally, the ambition of professional growth requires sacrifice and often work progress is at the expense of the family. The sexual revolution and emancipation took the woman out of the family hearth and found her place on the labor market and in the office. There are professional spheres in which a particular lady is indispensable. As a result, even if she dares to become a mother, she can not take care of her child because she needs to get back to work quickly. It is normal for a person to seek individual development and to look for ways to improve their financial status or lifestyle. It would be irresponsible to create a child at all costs, regardless of the possibilities for its future optimal development. It is probably best to seek a golden environment where work is not at the expense of the child and vice versa - the family is not at the expense of work.

Educational reasons.

Definitely there are increasingly stormy and massive process of postponed birth and motherhood among Bulgarians. Some of the reasons for postponement and childbirth can be found in the aspirations of women to:

- completion of higher education;

- providing a job, professional career and realization;
- achieving good material standards and financial stability;
- healthy matrimonial / peer relationships, etc. [3, p. 241-242].

When we talk about education, it should not be forgotten that it is a value. Definitely education should not fall victim to the family. In recent decades, in our country, a lot of girls are heading first to the university and then allowing birth options. Higher education has become almost indispensable for finding a job. It is definitely not a prestige that a girl finds itself pregnant in teenage. However, girls should also know that the reproductive capacity of the female organism decreases with age. It is desirable to discuss this with specialists as early as the school age so that the girl has an idea of how she will prioritize her future by age.

Professional and career reasons.

There is a negative impact on the reproductive behavior of women and there is a wide spread of employment in the informal economy. While giving any chance to provide benefits in the absence of alternative, non-recognition of seniority, the absence of social security benefits in a possible accident lead to violation of the right to use incentives to encourage the birth rate provided for in current legislation. Therefore the promotion of fertility and promotion of child rearing must be accompanied by promoting legal employment of women and their social protection in the workplace. Combining work and family responsibilities is hampered by the trend of increasing working hours and wider distribution of work in the weekends, especially in the private sector, family and business services. All this has an adverse impact on the health of women employed and their reproductive attitudes, limits the time for raising children and full parenthood [5, p. 84].

On the one hand, the administrative work is not very well paid. On the other hand, private businesses require more sacrifices and it is not always appropriate to work for family women and mothers of young children. Which to choose: security and peace of mind or good income? Certainly the aspirations of younger generation today are for higher incomes. And childbirth is not priority.

Socio-psychological factors or finding of an appropriate partner.

As per I. Ivanov the basis of each person's choice is cultural, religious, historical, national, etc. certain ideals for man, woman, husband, wife. Many of them act subconsciously. Studies show that men are far more conservative and like classic female proportions and virtues, while women from different cultures are far more varied in evaluating male qualities. At the core of family life are practically eternal family values – understanding, fidelity, health and beauty. Author has an opinion that in Bulgaria the qualities of the perfect husband are associated with:

- a need for excellence;
- striving for leadership;
- professionalism;
- financial savvy;
- the ability to entertain;
- intelligence;
- common sense.

Among the qualities of the ideal wife are:

- physical attractiveness;
- eroticism;
- sensuality;
- communication skills;
- home-based skills;
- attractiveness to art;
- ability to understand [3, p. 20].

Finding a suitable partner is a good reason to delay with motherhood. It is very important to choose the right person that will care after child with. It is good if partners have similar points of view about child's education.

Other reasons. Of course, it is not possible all reasons to be defined, because they may be rather private and subjective. It is possible a combination between two or more reasons. It depends on person actually, on her lifestyle, on her dreams.

Finding a new partner.

Against the background of growing divorces and divisions between intimate partners, and the creation of new relationships after a marriage, the birth of a second or third child at a later age, which the mother creates with the new man, is more and more common. Often this is the reason not only for late motherhood, but also a great difference between the children of the first and second marriages.

Healthy reasons.

For health reasons, here are those that affect the woman's inability to get pregnant. In this case, postponed maternity can be seen as more

forceful than at will or at the choice of the mother. Unfortunately, reproductive problems affect more and more couples. Thanks to advanced medicine, many women with similar problems manage to get the desired baby, but often this happens at a later stage in their lives.

"Infertility is an important socially significant problem that affects a large number of Bulgarian families and couples and it reflects on the reproductive capacity of the population in our country. Therefore, in order to optimize the population growth, it is necessary to focus on the prevention, diagnosis and treatment of sterility "[5, p. 15].

Birth of the next child in the family (second, third, fourth or more).

It is not much likely to find a three or more children in family model in Bulgarian family. But fortunately there are exceptions. Here is the place to point that delayed motherhood don't give a big opportunity for next child in family. With other words: the earlier a woman begins to give birth, the greater is chance of having more than one child.

Main reasons for delayed childbirth were mentioned here. Aim is to determine factors and to measure their importance about person. All of these reasons should be discussed by specialist (social pedagogue for example) with girls at teenage – this should be some like first steps in family planning. It is better girls to be aware of possibilities and risks, so to avoid sadness and disappointment in future like being late for pregnancy.

RESULTS AND DISCUSSION

According to statistical index of the National Statistical Institute (2017) in the Republic of Bulgaria there is an increase in number of births after the age of 40 till 44 as follows: 2012-1124 births; 2013-1202 births; 2014-1401 births; 2015-1522 births; 2016-1731 births [6, p. 23]. For 2017 there are 1874 births [7, p. 23].

The results of a pilot survey, which includes 100 respondents (with different gender, age and education), show different views on the reasons for postponed maternity. Personal details about respondents will be revealed in other articles.

When the reasons for maternity are postponed, the respondents have a wide variety of opinions. 88% mark:

- economic (striving for economic self-reliance of women and fear of falling into dependencies at a time when they

are most vulnerable (childbirth and growing a child);

- educational;
- graduating;
- and career assertion and advancement prerequisites as fundamental to a woman's decision to postpone her motherhood for a later period.

Besides questionnaire, in a simple interview (conversation) some of the respondents say they also prefer an adequate family planning to happiness of women's sudden pregnancy. They think they need to feel stable to take such an important step in their lives. Men say that financial stability by law is their responsibility and should not be the reason for postponed maternity. This adds that age Dad's not so important, while mother's years are essential not only for pregnancy and successful pregnancy, but also for taking care of the newborn and the overall child care. It turns out that the male respondents are not particularly tolerant of the woman's decision to assure her independence before becoming a mother. They declare their opinion that parenthood is shared responsibility and similar efforts to redundant. Moreover, they somewhat downplay the role of the father, which gives rise to a feeling of inferiority. Male respondents add that women's education and careers are the cause of inadequate care for the newborn. The mother is quick to get back to work so she does not lose her winning positions and transfers her maternity responsibilities to another (father, grandmother, relative, paid nanny). The roles in the family are shifting. It is more and more common that the mother works, and dad takes care of the household and the children. By the way, these model is is beginning to be quite successful.

On the other hand, a large proportion of female respondents (38%) support the pursuit of financial, educational and professional establishment of a woman before her decision to become a mother. This, in their view, is due to the fact that "the times are very uncertain and can no longer rely entirely on the father's income". Moreover, the number of divorces and divorced partners is growing, and lonely parenting definitely requires the parent's economic stability. Respondents "justify" the mother with her willingness to accept the challenges of parenting, even those who are initially not supposed to be able to manage with. This can be seen as a manifestation of common sense and safeguarding the future.

Having a suitable partner is a subjective factor. However, it is a common cause of postponed maternity. 37% of respondents are of the opinion that finding a suitable partner often takes time that affects family planning. In conversation, they say it's much better to wait than to create a family with the wrong person just because the "biological clock" is ticking. It turns out that delay is preferable to the occurrence of misunderstanding between partners, followed by separation or divorce, which again affects children in the family. Asked further what they understand as "a suitable partner," the respondents say that this is the person you would like to create a family and children with. He is trustworthy, financially independent, responsible. It is not necessarily the better mate, but certainly the two parts have to complement each other. Almost everyone has any idea of the right person to spend a lifetime with.

The availability of an independent home as well as accessible services for raising and educating children is cited as the reason for later maternity by 91% of respondents and goes hand in hand with economic, educational and career-related factors. Respondents who have quoted do not want to risk, but admit that it is possible for a child to be housed in a home. The other 9% think that happiness about the birth of a child in the family should not be postponed because the perfect moment will never happen. Moreover, child care motivates parents and often proves their development and progress even in professional and financial terms.

Unfortunately, there are respondents that refer to the reproductive problems of women or men as the main reason for childbirth at a later age (81%). In this sense, there are two truths again:

- on one hand, the development of reproductive medicine is an opportunity for each individual to experience the happiness of parenthood;
- on the other hand, however, more and more women rely on the development of science and share the philosophy that, despite the delay, they will be given the opportunity even when the postponement of the moment is the main reason for seeking specialized medical help to carry out this natural process.

Reproductive medicine is undoubtedly one of the greatest achievements of humanity and gives

many people the chance to overcome their health problems and become parents. Women and men with reproductive problems should also be subject to socio-pedagogical support because they are going through many difficulties before realizing their dreams.

In the Republic of Bulgaria the model of a four-member family, consisting of two parents and two children, was retained for years. In recent decades, the image of the family as a public entity has changed very much, which has also affected the number of children in the household. Statistics show that one child born in family is quite enough. Rarely is the birth of third and more children in the Bulgarian family. Probably this is the reason why only 33% of respondents would point out this as a reason for later maternity.

Respondents also point to other reasons for postponed parenting, but all are derived from the ones already listed:

- separation of partners;
- uncertainty in the future;
- repayment of credit;
- disappointment from previous partners;
- unstable work;
- care for older family members;
- lack of courage for in-vitro procedures;
- adoption;
- lack of readiness;
- vague vision and perspective of the person's life;
- lack of time;
- careerism;
- excessive ambition of the woman.

Defining the reasons for postponed maternity is particularly important, especially when it is to be countered for better family planning and increased birth rates. It should not be assumed that women who decide to raise a child at a later age must be judged by society. On the contrary, they must receive social support at different levels: health, pedagogy, psychological assistance. Moreover, they need to be informed of the risks they are taking. Interesting fact is that a woman is pregnant at an age before 30-35 years, she is not an object of special attention, but a pregnancy after this age is always treated as a risky one. It seems that 40-years-pregnant-

women are doing something wrong. Society often blame them. They need social-pedagogical support, especially if their path to this pregnancy has been long and tough. And they need support not only during their pregnancy, put in child's education as well.

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DEVELOPING SOFT SKILLS IN CHILDREN IN FIRST GRADE THROUGH AN INTERACTIVE ENVIRONMENT

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ABSTRACT

The following paper presents author's interactive game models designed to develop soft skills in children in first grade. The methodology is laid out in a chronological order, and comprises of four main components: the formation of three mixed groups of children, interaction, evaluability by criteria, tasks designed for group work. Under these models every teacher is given the opportunity to develop their own game models and to present them to the children. These are powerful tool for the development of the soft skills and children's creative thinking.

Key words: *soft skills, interaction, interactive, interactive learning, group-competing organization*

INTRODUCTION

There is an axiom in the business sphere, which states, that hard technical skills will get you an interview, but the soft skills is what are going to land you the job. Soft skills are qualities, personal traits and social skills, which everyone possesses to a certain degree. They are these abilities, which help a person to adapt correctly to a work, school or social environment, as well as the skills for successful communication, teamwork, conflict resolution. The ability to charm, to befriend, to lead a team, to lead a dialogue, to work with colleagues, to give and receive constructive criticism - all these are soft skills. They are incredibly important for a successful job interview and career development, which is why they are highly valued by employers.[1]

The development of soft skills through our educational system is almost absent. Schools and universities are concerned with theory and dry knowledge, which are not supported with enough practical skills. At the expense of soft skills, the knowledge how to be a well-rounded member of society and to apply your abilities in practices is underestimated. A huge portion of the bulgarian workforce are finding difficult to communicate and work with people. Our informal education (teaching soft skills) is just as important as the formal.

"What are you gonna be when you grow up?" - this is probably the favorite question each

grown-up has towards a child. However, have you given thought, that for the success of today's children, the right habits, skills and competencies will be necessary, and which could be different from the ones, which have worked for you?[3]

According to a questionnaire to the executives of the HR teams in 500 of the world's largest companies, the most sought after qualities in the workforce in 2020 will be: the ability and desire for self-improvement, placing goals and time-planning, teamwork, effective communication, which includes a multicultural environment, critical and creative thinking. Leadership skills, strong motivation, self-confidence, curiosity, initiative, persistence. And this is far from the full list of soft skills - called also the skills of the 21 century.

The question of how to develop these qualities in our children doesn't have a clear answer, but one thing is certain - all leading experts claim that it is not about inherent natural abilities. On the contrary, they are developed and brought up and are going to serve the children all their lives, not only in work. The sooner the development starts, the better.

It is great for the children to have their first lessons at home, but never forget that you have to lead by example. As the English say: "Don't worry about disciplining your children, they are gonna learn from you either way - discipline yourselves." But, even this doesn't start in the confines of home, then in school it is absolutely necessary. Here, at our aid will be three crucial

points, an important part of the development of almost all personal traits.

1. Participation

To include children in our personal activities: household, professional, leisurely, to provoke their interest in new things, to play together. This way our children will develop curiosity, initiative, creativity.

2. Communication

To discuss with the children different topics, situations, people, events. This develops habits for listening, expressing opinions, effective communication, critical thinking. To give freedom to our children to debate with us - it helps the ability to stand and defend their ideas and positions, to seek alternatives, to resolve conflicts.

3. Cooperation

To motivate them with joined effort for a concrete goal, beneficial to all. The accent here is placed on establishing a goal and planning out time, on the gained result from the work in a team, correctness, responsibility for your own part of the work, appreciation of support and good advice.[2]

School is, of course, a wide field for developing all these important skills and competencies. Unfortunately, however, it is on this field that the biggest contradictions occur. Submission and conformity are encouraged much more than personal opinion and initiative. Critical thinking and unconventional solving are not valued as much as thorough retelling of the lesson. Theoretical knowledge does not go hand in hand with practical experience. Expressing your own strong qualities and self-confidence in your own abilities are subjected to the equalization. The eagerness to learn all life is discarded, by placing the impression, that the grade is more important than the mistake, that leads to acquiring new experience and knowledge.

EXPERIMENT

Due to the mentioned reasons, we have established a **goal**:

To build an interactive game model, with which to begin developing soft skills in kids in first grade.

Tasks:

1. Placing the children in an interactive educational environment with a team-competition organization of the process.

Developing three mobile work groups with a mixed composition of boys and girls together. Introducing the children to assessment through criteria.

2. Development and testing of interactive, gamified, motorized tasks for a team-competition educational organization.

The subject of the experiment were 46 children at the age of seven from primary school "Mihail Lakatnik", Bourgas.

RESULTS AND DISCUSSION

The described games are models of example tasks for a team-competition type of organization of work in first graders, with the aim of developing soft skills with the following four main components in mind: forming three groups with a mixed composition; assessment based on criteria; tasks designed for teamwork.

The groups must consist of relatively equal number of kids, and the number of tasks, which must be completed must be at least two in each lesson in physical discipline, and why not in the other disciplines as well.

The assessment criteria can be the following:

Speed - which group finished for a shorter amount of time;

Accuracy - which group performed more correctly, more authentically;

Originality - which group presented more interesting and more unconventional solutions;

Number of alternative variants - which group offered more than one solution to a given task;

The criteria can be given according to the character and specifics of the concrete task, that is, their number and combinations may be different in different tasks;

Tasks with team-competition work can be grouped in **three tracks**:

1. Tasks entirely formulated from the teacher - all components are designated by the teacher;

2. Individual formulation of the task from the students - the teacher points out just the main components of the task.

3. Tasks of a mixed type.

Chronology for carrying out the tasks:

1. In an accessible manner, the teacher introduces the children to the situation, whilst explaining in a motivated manner what is expected of the children. The conditions of the tasks can be repeated, but in a synonymous manner.

2. The criteria of assessment, as well as the time for discussion within groups, are explained in an accessible manner to the children.

3. Start of interaction and discussion within groups. During the discussion the teacher goes through all groups, listens to the commentary, gives additional guidance, corrects some suggestions.

4. The execution of the tasks starts.

5. Each group's performance is assessed according to the established criteria, or the group gives a motivated self-assessment.

6. Grading according to the assessment - 6 points - excellent performance; 5 points - a very good performance; 4 points - a good performance.

After each task, the acquired points are placed by the group's leader on a special, beforehand made, dashboard, in the form of stickers in different colours. At the end of the week, it can be announced to the children which group performed best.

Example interactive, game models for developing soft skills

Statue

Necessary equipment: pictures, frames of various sculptures, multimedia

Conditions of the game: the children are separated in three groups and are placed in three different places in the room. The teacher makes a demonstration with pictures/multimedia demonstration/ of different sculptures, while in parallel, explains to the children what a sculpture is, who makes them and why. Afterwards, the task is given to the three groups: during the span of one minute they must gather by groups, to brainstorm and discuss what group sculptures they can play out on the background music played by the teacher and to play out the sculptures when the melody stops. The game repeats 4-5 times. After the game the teacher gives an assessment about the performance of each group, according to the established criteria, and subsequently grades them with 6, 5 or 4 points.

Criteria for assessment: originality, number of variants

As a methodological unit, the game is good for focusing the children's attention, as well as developing the motor and coordination abilities with group combinations. The game also helps developing sense of rhythm.

Winter forest walk

Necessary equipment: materials which depict various animals or children's costumes of

animal. Appropriate musical accompaniment.

Conditions of the game: the children are distributed in three groups on the playing field. The teacher introduces the children to an imaginary situation - a winter walk in the forest. The tasks requires from the child to think and discuss what kind of animals they can meet during such a winter walk in the forest. They are given one minute. During the discussion, under an appropriate background music, the depictions of animals are demonstrated.

After the end of the discussion the task starts. On a background of the same melody, the kids play out various movements, whilst observing the dynamic demonstration, depicting different animals. On the appearance of an animal active during the winter the children start imitating its movements and sounds. The imitation continues around 10-15 seconds after which the frame is changed. This is repeated 4-5 times.

Criteria - accuracy, originality, number of variants.

After the end of the game a recap is made by the teacher, when the children must answer the question: "Why were some of the animals imitated, whilst other were not?". It is important, that during this part of the game, that the teacher gives information for all animals, and not just the imitated ones. The game is assessed by the given criteria.

Under this game model, a number of different variants can be developed, which can be used with different goals, for a methodic unit, during the different parts of the lesson.

Broken traffic light

Necessary equipment: Three gymnast's benches, equipment colored in the three colours of a traffic light(rings, cubes, flags, multimedia, etc.), background music appropriate for walking and running - 2/4, 4/4.

Conditions of the game: The benches or chairs are arranged in a parallel fashion in an appropriate place, so that they can be used at the end of the game, in the same configuration, for another aim. The children are arranged in columns next to the bench. When given a red signal from the traffic light - the children sit on the bench with legs split; on a yellow light signal - they stand up, ready for movement; under green light - they start carrying out walking or running movements around the bench in a column by one, all according to the rhythm and tempo of the background music.

Task for the groups: in the time span of one minute, the children must discuss what

movements they can perform with the given melody; what do the colors of the traffic light mean? The discussion in the groups is accompanied by the music that will be played out during the execution of the game. Before the start of the game, the teacher shows how the different signals from the traffic light will be given. The different phases of the game can be accompanied by the following spoken commands:

Step on the gas, the wheels are whistling!

Stop, breaks, the wheels are whistling!

Watch the traffic light.

If it glows in red, it's as if it says - stop and it's forbidden.

Yellow reminds you - wait and pay attention!

If it glows in green - come on, move along!

Step on the gas!

The zebra lays down its white stripes, as if to say, go on move across guys!

Step on the gas!

If the traffic light asleep is, and no zebra can be found - look to your left, then to your right, back to left, is everything sound?

The game starts with a musical motive for the walking movement, with a red signal - sit. What follows is a yellow signal - stand-up next to the bench. It quickly returns back to red. Next is yellow and then red again. This is done in order to focus the child's attention for the upcoming physical activity. After the teacher establishes the necessary readiness of the children, he gives a green light signal. With the green light signal the time for executing the different movements is gaged, and through the the yellow and red lights - the intervals of rest. Doses of the movements: for walking movements - 3-4 variants for around 15 seconds; running movements - 4-5 variants for 20 seconds;

Assessment criteria: accuracy, originality, variants. In this case the time for execution is more important than variants. The variants criterion is the last by which the groups are assessed, but it is important to stimulate the child's creativity.

The three bears

Necessary equipment: three big teddy bears, cones - 12 pieces, foldable tunnel for crouching through - 3 pieces, obstacles for jumping over 40 cm. - 9 pieces, hoops - 3 pieces, cubes - 30 pieces, rings - 18 pieces, ropes - 9 pieces, sticks - 9 pieces.

Conditions of the game: The children are placed in three columns behind a starting line, where each column stands next to one teddy

bear. In front of each column four cones are arranged in distances of around 1 meter from each other, one unfolded tunnel, three obstacles distanced one meter from each other, one hoop inside which 10 cubes are placed, 9 rings, 3 ropes and 3 sticks. The rest of the equipment is placed on both sides of the playing field.

When given a "start" signal, one child from each groups starts running, passess each cone in a ski-slalom fashion, crouches through the tunnel, overpassess the obstacles by jumping through them and then gets only one of the items placed in the hoop. Then the child returns without having to move through the obstacles again, places the item around the teddy bear and touches the hand of the next child in front of the column. The number of the children in the groups is not important, as the game continues until each of the items in the hoop is returned to the bear. After completing the game, the teacher simulates a recap of the game, which is abruptly interrupted, as a wolf's howl is heard. The teacher announces to the children that this is the Bad Wolf and that the bears are in deep danger. In order to help, the children must gather in their groups and discuss what kind of defense they can build with the help of the items they returned to the bears, as well as items from the room. After the discussion, the defenses are built. The children are then asked to explain what they have created, and how it's going to help the teddy bears.

Criteria: speed, accuracy, originality

Pokemon hunt

Necessary equipment: cubes with pokemon placed on one of the sides - 30 pieces, different items, like small rings, balls and others - 30 pieces, soft modules with different shapes and sizes - however many you have, dresser, ropes and others, hoops - 3 pieces.

Conditions of the game: In a distance of 10 meters, or at the end of the playing field an improvised labyrinth is placed with no more than four exits. In the labyrinth randomly are placed the cubes with the pokemon, with the image facing the floor, as well as all smaller items, which we have. With the parts from the dresser, the soft modules, the ropes and sticks the labyrinth is built (the building of the labyrinth is included in the preparation of the lesson).

At the other end of the room, behind a starting line the kids are arranged in columns by one (the number of kids in a group is insignificant), where a single hoop is placed next to each group. Before the start of the game, the

children are given one minute to discuss what a pokemon is, what it looks like, and to decide which entrance of the labyrinth to take.

After given a “start” signal, the first child of each group starts, enters the labyrinth, and seeks a pokemon. After finding a pokemon, the child takes it with him or herself, returns to the group, by exiting through the same entrance it used to enter the labyrinth. The child places the pokemon cube inside the hoop, touches the hand of the next kid. The game continues until all pokemon are caught. If a pokemon has fallen outside the hoop, it is not counted. The team with most caught pokemon wins.

Criteria: speed, accuracy.

Young artists

In this game model, children are given full creative freedom on topics chosen from the teacher. Two or three games with similar physical characteristics are picked, such that the children are familiar with them. The teacher introduces the children in the game situation, while beforehand having chosen a single child for his assistant and hides the child somewhere in the room. At the beginning of the lesson, the teacher, expressing wonder, announces that one of the children is missing. Everyone starts looking for the child. Once found, the child whispers in the teacher’s ear, that he doesn’t want to play anymore, as he knows no interesting games. Then the teacher suggests to all of the groups to spend two minutes to think and discuss how from the suggested two or three games to form another, new game and to invite the bored child to play together. Each of the groups is given opportunity to lead during its explanation of the created games.

Criteria: accuracy, originality.

Builders

Necessary equipment: cubes - 15 pieces, rings - 15 pieces, sticks - 9 pieces, cones - 9 pieces, hoops - 6 pieces, ropes - 3 pieces.

Conditions of the game: at a distance of 10 meters, on a starting line are arranged in each of three separate places two hoops, five cubes, five rings, three sticks, three cones, and one rope. Depending on the goal of the game, for example if the game is endurance testing or explosive power of the lower limbs, there can be placed different objects between the starting line and the cubes, rings, sticks, cones and ropes. If the game is aimed at developing speed, then no other objects are required.

The teacher points out the types of the items and gives opportunity to the children to take one

minute time, to discuss what building project they can execute with the supplied items. In what order will the items be taken?

The children are placed in three columns behind the starting line. Under a start signal, a child from each column starts and takes just one item and brings it behind the front of its own group. After taking a couple of items, the children waiting for their turn start building their project with the items gathered. The end of the game is reached when their project is built.

After the game ends, each of the group is given opportunity to present its creative solution. During the discussion, children from the other groups are allowed to ask questions and to give opinions, and this has to happen without necessity to raise a hand. The groups make self-assessments based on the criteria given.

Categories: speed, accuracy, originality, number of variants.

Autumn adventure

Necessary equipment: three gymnast’s benches, paper balls - 50 pieces, blue ribbons and ropes (for contouring the river) - 2 pieces, balls - 9 pieces, cubes - 30 pieces, rings - 15 pieces, hoops - 9 pieces, three ordinary trash bins, cones - 18-21 pieces, appropriate background music.

Conditions of the game: Behind a starting line the three benches are placed in parallel. The children are arranged in three columns, 1 person wide, behind the benches. At a distance of around 3-4 meters from the benches, the paper balls are scattered around. The trash bins are placed there, in front of each group is placed one. After that, in columns, the cones are placed at distances of one meter from each other, 6-7 for each group. 10-12 meters after the paper balls, the contours of the river are placed. Immediately after that - the rest of the items - 3 dense balls, 10 cubes, 5 rings and 3 hoops for each group.

First part of the game: Analogous to the game “Broken traffic light”. The children are given opportunity to spend one minute to discuss and decide which walking and running movements they can carry out, moving around the benches according to the given background music. The performance of the children can be accompanied by the clarifications of the “trip guide” (the teacher) where the route of the “buses” pass through. At the end of the running movements the children continue next to the paper balls.

During a resting interval, the teacher announces to the children, that they have reached a massive field, which is, unfortunately,

contaminated from unaware tourists. Each of the groups receives a task to help clean the field, by placing the gathered “trash” (the paper balls) in the groups trash bin (generally developing exercises involving squats and tilts). After “cleaning the field” the first part of the game is complete. The teacher assesses, using previously established criteria: **accuracy, originality, speed.**

Second part: “Cross the river”.

On the background of appropriate musical accompaniment, the children cross, in slalom and jumping fashion, arms placed on the shoulders of the front child, in group coordination, through the cones and reach the river.

There, there are met with a big surprise - “the good wolf” wounded and bandaged (a child with a costume and mask of a wolf). He announces to the children to not fear him, because he is good and unhappy, as he has no friends among the wolves, as he is not bad like they are. He likes to play, to sing and dance, but most all he likes walks through the forest, though he knows not one tree’s name.

The teacher then suggests to the children to help the sad wolf, by constructing a tree leaf, using the items on the other side of the river. Each group has to make one tree leaf. To do this, though, they have to cross the river, to create a bridge that only one kid can pass at a time, to take one item and to return it back again through the bridge.

The game ends when on the other side of the river no items are left. The teacher suggests that if the children are afraid of the river, they can refuse.

Each of the group is given one minutes to discuss what kinds of trees we can observe in the forest, what leaf and which tree they will show the wolf, how the leaves look during the fall, and how they are going to cross the river. All equipment in the gym is available to them. After the discussion, the game begins.

Assessment criteria: speed, accuracy, originality. As a conclusion, the children show the wolf their constructions, while saying something about the depicted leaves and the trees they are bound to. The wolf points out the most beautiful leaves. The grade each groups receives is a sum of the points received from both the first and second part of the game.

Using this game model, an entire lesson in physical discipline can be carried out. The included elements in the game can be arranged in any combination, with a range of aims.

Grandfather without turnip

The teacher tells the children, that everyone knows what happened to the old man, who finally pulls out the turnip with the help of the whole family. But what would happen if no one from the family likes to eat turnip. What would they do, to prevent the old man from pulling the turnip.

To make the game more interesting, the teacher suggests the old man’s family to grow with two daughters, two brothers-in-law, two granddaughters and one grandson. The number of the added heroes depends on the number of the children in the groups, so that each kid to have a role.

Kids are given more time to discuss and decide. After that each group demonstrates its solution, by showing it and realizing with another group.

Criteria: accuracy, originality, number of variants.

The most original solution can be turned into a comedic performance, and can be played out on events in front of the parents.

Under this model, the scenario of each children’s literature piece can be transformed.

Under the appropriate material base, the game can be made into a relay game, where the kids from each group can work in pairs.

Criteria: speed, accuracy, originality.

Vacation

Necessary equipment: Depictions of winter, spring, summer and autumn pictures from our resorts, two for each season. The pictures should be large enough to be easily viewed by the children in different spots around the walls of the room. Appropriate background music.

Conditions of the game: The children are scattered in the room and carry out free movement, whatever the rhythm and tempo of the background music suggests. After the music stops, the teacher names a random season. The children must then quickly orient towards the picture depicting that season. They must arrange in a column in front of the picture and behind the group leader. The fastest group is given the opportunity to explain in a few words what the picture depicts.

The music starts and the game is continued in the same fashion. This repeats 4 - 5 times. Once the game is solidified, to spice things up a bit, the teacher names also the configuration in which the children must arrange in front of the picture - column, circle, row. After perfecting that, the children may also form letters with their bodies.

Before the game starts, in a one minute time window, the children discuss their impressions from the visited by them resorts and natural landmarks and what they look like during the different seasons. The children view the pictures.

Criteria: speed, accuracy, originality.

The analysis of the results from the research will allow us to make the following **conclusions**:

1. The correct and systematic application of the suggested by us interactive, integrative, physical model for developing soft skills in first graders offers a practically unlimited number of possibilities for a complete pedagogical communication, which is the main and sustainable factor for the psychological and personal development of children across the spectrum of physical and mental capabilities.

2. With the initial studying of the different physical activities, included in the standard program for physical discipline in first grade, the children can build a general view of the concrete physical activity. But only after applying it with the experimental model, they can acquire the ability to immediately cover the whole range of successive movements with a single view. This ability is a necessary condition for forming operational thinking and opens up huge possibilities for subsequent mental development. This coordination can be carried out in a mental plan, in the plan of ideas.

3. With the application of the suggested model for developing soft skills, the children will

develop the ability to coordinate their order of movements, as well as the intervals between them, which consequently forms and solidifies the concept of time.

4. The application of the these game models for developing soft skills is met with great excitement and interest from the children, since they are allowed to realize a motor product of their own creative ideas, without violating the concrete physical characteristics of the tasks. The lesson is carried out in an environment allowing a relatively greater freedom of movement, within the frames of specific criteria, coherence of actions and mutual support. The movements are distinguished with a lot of variety, dynamics, coordination played out in the condition of a group coordination.

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BY THE PIKE'S WILL: THE RUSSIAN FAIRY TALE AND THE SOVIET REALITY

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ABSTRACT

The article is dedicated to the first feature film for children, the fairy tale "By the Pike's Will" (1938), filmed by director Alexander Rowe. In Soviet Russia, cinematography was looked upon as an ideological weapon. Film-tale "By the Pike's Will" combines traits of the Russian folk tale and political satire.

Key words: didactic cinema, Russian fairy tale, Alexander Rowe, *By the Pike's Will*

From the first days of the Soviets, cinema was viewed as a powerful means of influencing the masses. As early as November 9, 1917, two days after the October Revolution, the State Commission on Education was established, and its integral part was a film department. Nadezhda Krupskaya became the head of this department. She expressed her opinion on cinema in the letter to the cinematographers of Soviet Russia: "Living images, living examples excite, capture; cinema is a method of persuasion through the show, an extremely effective method of education" [5, p. 4].

The policy of the government was formulated in the resolution of the First All-Union Party Conference on Cinema (March, 1928): "it is necessary to make more use of cinema for current agitation" [12, p.27]. A separate task that the All-Union Communist Party (Bolsheviks) set for the film industry was the creation of children's films, since "the language of cinema, the language of visual images is the most specific language that the child can understand" [3, p.3].

In the 1920s, Soviet pedagogy was given five tasks: "internationalism, antireligious propaganda, class character of the society, propaganda of the five-year plan and defensive capacity of the state" [4, p. 12]. The Soviet country needed "millions of devoted, knowledgeable, creatively working builders" of Communism [15, p.3], and it was necessary to educate them quickly.

Under these conditions, cinema came to the fore as an ideological weapon, since it was "concrete and emotional, produced grandiose

impression upon spectators, was really "magical" [6, p.5]. Even school films used in the classroom had to be ideologically consistent. [9, p.6].

Films on the "status of the peasants in the epoch of serfdom" were demonstrated at social science lessons [9, p.34]. Thus, the feature film "The Skotinin Family", made in 1931, was re-edited for children. The film corresponded to the theme "Tsar power as the power of landowners and capitalists" in the program of the Soviet school [9, p. 34]. The annotation read: "The life on the estate of the Prostakovs. Brutal exploitation of serfs" [9 p.34]. Films like "Mikola-Dzherya" (1928) on the subject of "serfdom in Belarus" and "Abrek Zaur" (1926), telling about the life of Caucasians under tsarism, were recommended for demonstration at social science lessons as well [6, p.38].

Any phenomenon in the children's film was viewed from two points: as it was "in tsarist times and as it is now" [9, p.32].

Politicized films were created even for biology lessons. The film "What the Cow Moos About" (1929) focuses on "the lack of winter fodder for the cow in a poor household" and the fodder procurement in the collective farm [9, 51]. Another film devoted to the fight against agricultural pests, demonstrated the unsuccessfulness of combating them "in the conditions of one-man farm" as opposed to the work of a collective farm [9, 100]. The use of the "was - has become" formula was meant to invoke a striving for new socialist achievements among young viewers.

However, the majority of films made in the late 1920s and early 1930s expressed communist ideas too bluntly, were rather propaganda items that could repel a large part of the children's viewing audience. It was necessary to find a more subtle approach. It was suggested by the resolution of the First All-Union Party Conference on Cinema (March 1928): "it is necessary to search and apply new forms of the cinematographic genre Particular attention is to be paid to the creation of Soviet comedy films" [12, p.27].

Alexander Rowe made a fairy-tale film for children "By the Pike's Will". It was not by chance that the fairy tale genre was chosen for the film adaptation: "a fairy tale ... gives rich material to a child's inquisitive mind" [2, p.41]. Rowe himself believed that "without a kind smile, without a harmless joke, there is no warmth, no light, and therefore no fairy tale" [13, p.33].

The film "By the Pike's Will" is characterized by smiles, jokes, and subtle humor. The film could easily attract children from very different families, and yet this film turned out to be an effective "tool for the formation of class consciousness" [3, p.4].

The film is not an adaptation of Russian folk tales. It was produced using the script of E. Tarakhovskaya, based on the four Russian fairy tales ("By the Pike's Will", "The Princess Never-a-Smile", etc.). According to film critic V. Tatishvili, who wrote a detailed analysis of the film, E. Tarakhovskaya's script "does not contradict the spirit of folk art" [14, p.6]. The author created a "true folk tale, devoid of literary falsity, a colorful, cheerful and optimistic tale" [14, p.6].

The plot of the film is simple and at a first glance close to the genre of folk tales [10]. A poor peasant named Emelya lived with his mother in a Russian village. He worked a lot, but he could not get out of poverty. One day he went to fetch water and caught a pike speaking in a human voice. Emelya let her go, and she taught him magic words, thanks to which all his desires were fulfilled: the buckets themselves went home, the firewood was sawed and placed in a sleigh by itself, winter turned into summer.

The kingdom was ruled by King Gorokh, who had a daughter named Never-a-Smile. The king gave orders to his citizens to amuse the princess. The reward for this difficult task was the princess's hand. Emelya went to the palace, riding a Russian stove. He managed to make the

princess laugh, she fell in love with Emelya and left the palace with him. The king tried unsuccessfully to return his daughter to the palace. Emelya and the princess, who had been given a new name, Masha, in her new life, had a merry wedding.

The scriptwriter had to create images of fairytale heroes so that, on the one hand, they were perceived as folklore personages, and, on the other, there would be no doubt about their correct ideological interpretation [10]. Thus, in the folk tale Emelya is a lazy-bones, a sluggard, not willing to work. In the film, Emelya is an eager worker who is ruined by the exorbitant taxes imposed by the tsar. The folktale does not explain the cause of Never-a-Smile's tears; the film's little viewers should understand that the princess is crying, because she has nothing to do, she is lazy, capricious, spoiled. In fact, crying is the only thing she does really well.

In Russian folklore the tsar for the most part either punishes the guilty or awards heroes. The film shows us a stupid, greedy, cowardly petty tyrant, who does not reward his close ones, and orders the execution of all without distinction.

The basic principle of film editing, as it was prescribed to film producers by Soviet educators [4, p. 14], is contrast: we see Emelya's poor hut and the luxurious chambers of the palace; the merry, cheerful peasant, never losing heart even in the most difficult circumstances, trying to help both people and animals, is opposed to the ever-weeping idle princess and the tsar, who is cruel to all without exception. Thus, one of the main requirements for children's films is fulfilled: any film must be "always socially oriented, marked by human activity, work and the struggle of social groups" [4, p.13].

While the political idea underlying the film is easy to discern, Rowe's film cannot be directly attributed to propaganda pieces. Rowe created a fairy-tale comedy, his characters make the viewer laugh, but there are different types of laughter in the film. The laughter is kind in the case of Emelya, his mother, even Never-a-Smile at times; it is satirical, when we observe the behavior of Tsar Pea, his general, and boyars.

Thus, there is a lot from the circus, from clownery in the behavior of the positive heroes. Emelya falls down from time to time, jerking with his legs in a funny way, sometimes he drops down topsy-turvy into the snow [10]. Emelya's mother, having received a fur coat from her son, falls down under its weight, Emelya exclaims in surprise: "Mummy dear, where are you?" And

receives the answer in a thin voice: "I am here" [10]. Never-a-Smile cries, and the viewer sees not teardrops, but tear spurts, sprinkling as if from a watering can [10]. A scene in the forest shows a bear that behaves in the same way as trained animals do in the circus arena: it embraces Emelya, gives him a paw, blows into a horn [10]. The circus aesthetics of the film is not accidental, since most children could only afford simple entertainments, going to the circus amongst them.

Another kind of laughter is caused by scenes with the participation of the King Gorokh, the General, the boyars. For example, when Emelya rides into the royal chambers on a Russian stove, everyone present is frightened and hides. The General calls the Tsar: "Czar-father! Tsa-a-ar!" and receives an answer from behind the throne: "I am not here!" [10]. Little viewers should immediately understand that the tsar is cowardly and stupid and as a result they should laugh at him.

Tsar Gorokh's notion of justice shows him as a very cruel person: "Put them on a stake! Grab them! Chase them! Catch them! Hang them!" [10], but the Tsar's words are contrary to his appearance: he is a funny, sickly old man with sparse hair.

E. Tarakhovskaya's script is characterized by the features that have distinguish any comedy since antiquity: surprise, discrepancy, exaggeration [8, c.203]. When the buckets go into the hut themselves, this is a surprise both for Emelya and the viewer.

Most often, filmmakers resort to inconsistency and exaggeration. Princess Never-a-Smile, old enough to get married, behaves like a little girl. She sits on the throne, screaming and jerking her legs. At the sight of the ice cream she shrieks that she feels frozen. She is warmed up with the whole chest of fur coats [10].

The king makes decisions with the help of a primitive children's divination: a positive decision is made if the king succeeds in joining his index fingers with his eyes closed [10]. The general, who deserves an award for wise advice, does not receive it and instead of being indignant, shouts: "Hurray!" [10].

Frames with texts, separating one episode from another, associate Rowe's film with the tradition of silent cinema.

Including such texts in the visual of the film was prescribed by teachers dealing with cinema-didactic problems, for example: "... inscriptions are a necessary addition to the pictures they

should emphasize only the main idea of the film in a condensed, lucid form "[9, p.14-15]. The role of the inscriptions is to establish "an organic connection between the educational material and the educational process" [4, p.12], to "induce children to fight against all the remnants of the old, to fight for a new socialist, classless society" [7, p.5].

Perhaps not all the frames with the texts have been preserved over the 35 years of the film's rental (the film was restored in 1973), but the surviving texts meet the requirements of the film-didactics of the time: they are short, expressive, exact, and the main idea was formulated unequivocally. For example, the text in the first frame is as follows: "In a certain kingdom, in a certain state, there lived a poor peasant Emelya. No matter how much he worked, he had nothing at all" [10].

The demonstration of the film was accompanied by the work of the film educator, who for a proper understanding of the film was to read the inscriptions out loud and stop the demonstration, if necessary, and explain the meaning of what was happening on the screen.

The film "By the Pike's Will" is the first feature film for children. Its purpose was to strengthen the communist worldview. Rowe tried to create a new Russian fairy tale on the screen. The ideological objectives of the film are well traced, but there are qualities for which Rowe's films are appreciated by all viewers, both young and old: these are attractive main characters expressing ideas of hard work, mercy towards the weak, disapproval of idleness, anger, stupidity, and greed. Rowe's films, which combine communist ideals and nationality conceptions, still convey the charm of the true Russian fairy tale.

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SOVIET FILMS OF THE 1920S-1930S FOR AND ABOUT CHILDREN: COMMON FEATURES AND AIMS

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ABSTRACT

The article presents a review of the first Soviet films for children and about children (1920s-1930s). It is shown how the requirements that should be met by the children's films are fulfilled in several specific movies.

Keywords: *didactic cinema, film qualities, educational purposes*

The history of children's cinema in Russia began shortly after the October coup. The first children's films were shot as early as 1919, despite the famine, destruction and the Civil War [2, p. 25].

For quite a long time, children's films were not released systematically [2, p. 25], but the importance of cinema for the education of generations of Soviet people was realized from the first days of the revolution: cinema was perceived as a means to "erase the remnants of capitalism from the people's minds, to educate a generation of fighters for socialism, conscientious members of socialist society" [17, p.5].

In 1936 a special film studio, "Soyuzdetfilm" [2, p. 27], or the Soviet film studio for children's and youth's films, was organized. It was supposed to specialize in the production of children's films.

Many articles were published after the First All-Union Party Conference on Cinema (March, 1928). They were the result of the discussion concerning children's films. It was necessary to define what a children's film, either educational or a feature, should be from the point of view of film production and the actual content of the film itself.

The main qualities of cinema were called "simplicity and intelligibility" [11, p.7], "emotionality" [9, p.5], "concrete character", "lucidity" [5, p.3]. Owing to these qualities, a well-made film captured and held the attention of the audience, "stimulated [them] to be active" [6,

p.12]. A film addressed to children had to meet the following requirements: "educational, comprehensive, analytical and dynamic" [6, p.9].

The term "education" [6, p. 9] was understood as the task of forming a communist worldview in children's and adolescents' consciousness. "Complexity" [6, p. 9] meant "depicting such phenomena that serve as context not only for its description, but also its interpretation through the establishment of the mutual connection among these phenomena" [6, p. 13]. "Analyticity" was no less important [6, p. 9]: "every detail, every part of the phenomenon should be coordinated with the whole, and one should show the way of connecting this part with the whole" [6, p.13]. "Dynamism" [6, p. 9] not only helps to keep the attention of the children's audience, but it also orientates the audience in the direction, given by the filmmakers: the film "unfolds as evidence of some thesis" [6, p. 16]. A lot was said about the editing techniques thanks to which the film becomes fascinating: episodes are combined by contrast or similarity [6, p.14], we can speak about "conventional representation of processes invisible to the simple eye" [6, p. 14], the image of the "relationship of causes and effects" [6, p. 14].

The principle of contrast is also used when it is necessary to show "what was in this place earlier, and how what is observed now appeared" [6, p. 14], as well as in a situation when it is necessary to compare two phenomena and show the advantage of one over the other, for example,

“the big benefit of a large farm over a small one” [6, p. 15].

From the point of view of “general film construction” [13, p.32], the director needed to pay attention to the use of “large-scale frames and general views” [13, p.32], to “frame construction” [8, p. 14].

The peculiarity of the first films for children included “captions which helped directing the development of the film’s idea in the [... given direction – M.N.]” [5, pp.13-14].

The captions were brief and lucid, they served as headlines for the separate parts of the film and at the same time helped to reveal its general idea.

For example, the script of the film “Collectivization of Agriculture” had the following ratio of inscriptions and episodes:

Caption: How did the peasants live before the revolution?

Frames: The old peasant hut, poor equipment, a beat-up horse, half-starved life. The well fed-kulaks live in abundance. <...>

Caption: But now the October Revolution took place.

Frames: ... The peasants get rid of the landlords, police officers, village constables, foremen and themselves become owners of the land. [1, p.19].

The content of children's films was determined by “five basic educational principles” [6, p.12]: “internationalism, antireligious propaganda, class character of the society, propaganda of the five-year plan and defensive capacity of the state” [6, p. 12].

However, the authors of the scenarios and directors had to take into account the age of the young viewers, their “straightforwardness, narrow scope of interests and ideas, and lack of experience” [14, p. 30]. Therefore, it was still possible to find in children's films: “coherent images, beautiful pictures, exciting tricks” [18, p.126], “actions, relationships and adventures of people” [5, p. 13-14], “abundance of animals” [13, p. 32].

As films were used at school, special teachers, film educators, had to explain the film’s content correctly: “Children see dozens of films, but they do not know how to watch. We must teach them”[4, 19].

As Russia was an agrarian country, one of the first Russian children's films was “Gerasim and Mumu” (1919). This film served as a realization of the educational principle concerning the class character of the society. The film is a screen

adaptation of Turgenev’s story “Mumu” [18, p.127].

The film has now been lost, but its content was discussed in the press comments of the 1920s-1930s. The scene of action is a gentlewoman's estate. The film depicts a quarrelsome, capricious, cruel old gentlewoman and her serfs, who led lives without any rights.

Film educator N. Tolstova recommended focusing not on the personal drama of Gerasim, “handicapped from nature, withdrawn, with his apparent severity and great love” [18, p.127], but on the “social side of the picture” [18, p.127], since “personal drama was closely connected with the social status of the hero, with the social system of the era in which he lived” [18, p.127].

If we want the small audience to understand the content of the film correctly, “we need to remind them about the relationship between the landowners and their serfs; speak about the power the gentry had over their serfs” [18, p.128].

The film “Pashka” (1931) also belonged to the same category. It was recommended to watch this film in the 1st grade of school during social science lessons [17, p. 32]. The film depicted the activities of the pioneers in the village, showed how they participated in the sowing campaign and exposed the sabotage of the kulaks. The kulaks tried to prevent collectivization. They sawed off the supports of a wooden bridge in order to drown the collective farm tractor in the river, but Pashka, one of the village boys told the pioneers and the collective farmers about the kulaks’ plan. Thus, Pashka opposed his own father, who supported the kulaks. The commentary to the film says: “The film gives specific instructions on how to involve unorganized children in the social construction of the village in the best way” [3, p.4].

The historical film “The Soldier's Son” (1928), which also concerns the class character of the society, focuses on the “labor movement of 1905 and teenager workers taking part in the revolutionary movement” [7, p.3].

The main character of the film is Kolka, a boy from a poor family. His father “fights against the Japanese” [7, p. 3], and his mother tries to bring up three children: “From morning till evening she bends her back over the trough – she works as a laundress” [7, p. 3]. Kolka is expelled from school, and he gets a job at the plant. There he meets the worker Alekseev, “the revolutionary, the organizer of the workers” [7, p.4]. The workers' strike organized by Alekseev is

dispersed with the help of the Cossacks: "Cossacks attacked the workers with whips, with rifles. – 'Fire!', commanded a Cossack officer" [7, p.5]. During the dispersal of the strike Kolka is wounded and Alekseev brings him to his home. They are pursued by the Cossacks, and Kolka's father, who has returned from the war, kills an officer, defending his son.

This film was highly appreciated by the audience ("one of the few children's films that are equally interesting for both young and adult viewers" [7, p. 6]). According to the film critics, the drawback of the film is "the absence of outcome. It is as if the end of the tape was torn off, and the viewer is at a loss: What's next?" [7, p.7]. According to the authors of the brochure about this film, "this deficiency must be corrected with the help of educational work based on the film" [7, p.7]. The clue for the film educator is the "editorial script" and the captions included in the film's fabric.

The last three texts that do not appear on the screen, as stated in the commentary to the film, show how events could develop in it: "My father was shot for the officer's death", "Alekseev only returned from hard labor in the 1917", "now he lives in the Urals, and works as the director of a large plant" [7, p.24].

The commentary to the film explains that the film "can be perfect for the course of social studies, on the anniversary of the 9th of January and in the October days" [7, p.7].

Militarization of the country was pursued from the 1920s. Defense propaganda was carried out with the help of cinema. Thus, the film "I want to be a pilot" tells about a girl named Tanya, who loves to read and dreams of becoming a pilot. To prepare herself for her future profession, Tanya joins the aircraft modeling circle. At first she does not succeed, but she is persistent. In the end, her aircraft model named "The Delegate" wins the competition. The last frames of the film reflect its main idea: "The big balloon, made overnight by Vitya and Sema, soars high. "Everybody, join Osoaviakhim! ", reads the slogan on the ball " [12, pp. 4-5].

The main idea of the film is outlined in the commentary to it: the film "agitates in a bright and lively manner for air modeling – the first step towards mastering aircraft technology" [12, p.7].

Not all films were a success. Thus, the film "I Am Not Little", filmed in 1932 and based on S. Rozanov's story "Travka's Adventures", is

considered thematically overloaded [15, p.5], since it tells about the "life of children in preschool institutions of the USSR" [15, p.5], about "ways of transportation and means of communication" [15, p.5], and about "the advantage of a collective excursion over the walk of a loner" [15, p.5] as well. According to the plot of the film, a little boy named Travka, who goes with his father to look at the dirigible, gets lost and sets off on his own. The boy travels by train and tram, and the news that he got lost, is transmitted by radio. His family learns from the telegram that Travka returns home.

According to the film critic I. Muravyov, the "gaps" [15, p. 6] in the story should be filled by the "film educator" [15, p. 6], whose work "can consist of explaining all the themes of the film" [15, p. 6].

Any child is interested in animals. The life of the animals in the city is shown in the movie "The Adventures of Arishka" (1929). This is a comedy about the adventures of the trained monkey Arishka, who is whipped by its cruel master. Pioneers save the monkey: "Animal protection, children's care for them, organized leisure activities and pioneer work may serve as a plan for pedagogical work with the film" [16, p.7].

The film "Polesye Robinsons" belongs to those films that "expand our children's knowledge of the world around us" [10, p.3].

According to the plot of the film, two boys go to an island in the middle of a large river by accident. The island is a state beaver reserve [10, p.3]. The boys observe the life of animals there. However, a political theme suddenly appears in the film. The boys see "a boat pull up to the island and an old man land with a gun on his shoulder" [10, p.5]. The boys watch the stranger: "There can be no doubt - this is a kulak. He must be arrested." [10, p.5]. They try to detain the suspicious old man and find out that he is not a kulak, but the keeper of the reserve.

According to film educators, "there should not be a purely geographical, technical, or historical film" [6, p. 13], any film should cultivate "the minds of schoolchildren and pioneers and make them see the struggle of the working class and the Bolshevik Party correctly" [10, p.3].

Though in the 1920s and 1930s the themes of children's films could be various, they were based on the principle "what was earlier – what is now". The films were supposed to show the difference between the past and the present of the

country, between the Bolsheviks and their opponents, to teach children to be vigilant. The purpose of the films was to form new generations of Soviet people, ready to fight for the cause of the Communist Party.

In the 1950s the rearing of such people made it possible to realize slogans such as: "100 thousand engineers for the Motherland!", "Everybody, come to work to the virgin lands!", and later the work of young people at the Komsomol construction sites and in student construction teams.

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BASIC PROBLEMS TO SOLVE IN STRATEGIC CONTROLLING IMPLEMENTATION

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ABSTRACT

In modern Europe, strategic controlling is understood as super-management and the controller is an assistant of the manager, i.e. the system studied should provide opportunities to be collected and classified. Aiming to initiate the measures the necessary information must be processed and analyzed but the company manager only has the privilege to make the final decisions. According to the Bulgarian practical model, controlling system is assumed to be every management system beginning with the lack of differentiation between controlling and control and ending with the managerial reports. In the present paper, strategic controlling is discussed from the point of view of the German school. It means that such a system should have five elements: planning, organization, human resources management, provision of information and control.

Key words: *strategic controlling, implementation, planning, organization, provision of information and control, human resources management.*

INTRODUCTION

The implementation of strategic controlling system is required to solve the following types of problems:

1. Decline of company manageability (especially in holdings with divisions located in geographically wide areas);
2. Frequent divergence from the strategy approved, results obtained, delay the achievement of objectives for unspecified time;
3. Realization of irrelevant and risky investment projects which consume the available funds necessary for projects of higher strategic importance;
4. Poor controllability of financial flows, budget shortages;
5. Enhancement of operation risks (it is quite complicated to rely on the strategic controlling to solve this problem but it could help making high quality analyses).

EXPOSE

At certain stage of its development, every company begins to pay special attention to measurements of realization rather than development strategies. [6] Here, the managers have to solve a number of problems: what key parameters should be measured and controlled, or if the non-financial activities are concerned, which indicators should be used. Such problems

can be managed by Balanced Scorecard (BSC) provided it had been proficiently implemented. One should not expect wonders half an year after the implementation since the effects are expected to become visible after 3-4 years. Despite that R.Caplan and D.Norton have discussed the necessity to take special care of non-financial criteria, the basis of BSC are the financial indicators because of the convenience in data collection and parameter interpretation. [1,2] Using the system of strategic controlling, the necessary parameters not related to company financial reports can be interpreted. For this purpose, a special kind of reports is used which are delivered to the top-managers at certain periods of time (monthly, quarterly, annually). Thus, the system for strategic controlling executes its function of providing information. The reports could be either put on paper or returned in some electronic form. In the second case, the necessary information is entered into BSC and graphically illustrates the fulfillment of the tasks. The aimed values of the criteria could be changed on operative basis in order to assess the current situation and determine what should be done to achieve the planned values – the process of management occurs online rather than “by exchanging words”. Each criterion in the controlling system is planned and/or predicted to compare the planned and predicted values. The deviations are analyzed: if it is acceptable corrective measures are not undertaken.

Otherwise, either the planned value is corrected or measures are taken to improve the situation and achieve criterion value.

For instance, the key performance indicator of a German industrial company that is using the BSC system includes: [7]

*Finance. ROCE, turnover profitability, turnover increase, free cash flow

*Clients. Turnover /number of customers, client satisfaction, shares of clients A and B in the total turnover of the company / Activity Based Costing method according to Pareto's rule /

*Internal processes - vending profitability, production and logistics costs, distribution costs.

*Training and development. Share of new products in the total turnover, availability of strategic information, satisfaction of personnel, a time reduction for data propagation horizontally and vertically in company structure.

Actually, the indicators are more, about 38, and these mentioned above are only part of them. However, it is not recommended to take more indicators since it would stray managers attention and data collection would become too hard. According to different estimations, the optimum number is twenty to thirty. If the company is big enough and all the indicators are really important for the strategic management, their number can be increased to 60.

Let us consider in detail the financial components of BSC. Generally, the perspective "Finances" should answer the question what shall we do for the shareholders/owners in case of success. During strategy formulation, the following questions must have adequate answers: What is the financial goal of growth and efficiency? What are the main sources of growth? The financial component consists of two elements – growth (development of new sources of income and profitability) and efficiency (the result from the operations aimed to fulfill the client target components, the efficiency strategy aims to reduce costs and increase productivity) – both of them are important for the increase of shareholders value.

Growth strategy may involve two components: [3]

1. Franchise organization. The development of some new income sources markets, new products and clients. It requires the longest time and more changes for its realization.

2. Increase of customer value. Work with clients to broaden and deepen the relationships

between them and the company. It is characterized with shorter period of time and focus on processes like cross deals and development of existing projects.

The efficiency strategy also has two components: [1]

1. Improvement of costs structure - reduction of variable prices of some products and services, cutting indirect expenses and co-utilization of common resources with other business divisions.

2. Effective use of assets. Reduction of fixed and circulating capital necessary to maintain the business at the desired level, more effective utilization of assets especially by acquiring and liquidation of fixed and current assets.

The balance between the growth and efficiency strategies leads to the contact between the financial components and the strategies. The companies, in their initial stages of development, emphasize on the growth of income. The expenses and efficiency appear to be supplementary factors for such companies which start 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 companies at further stages of development is that they find a balance between the two strategies. [1]

It is generally assumed that the financial indicators show the result obtained (so called lagging indicators or final indicators) and this is their disadvantage against non-financial ones which indicate for future results (leading indicator). Of course, it depends on 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 leading indicator rather than one reflecting the future. The indicator "Number of complaints" (in perspective – customers/markets relationship) is non-financial but shows past results so it is lagging indicator. Beside such KPI, in perspective the "financial" indicators like gross profit, operating profit, ROI (or ROCE EVA as variant), profitability, revenue, products turnover, etc., reflect the operative activities. Insignificant numbers of Bulgarian companies pay attention to the development of business, increase of company values (which is the indicator management efficiency) and increases of the volume of strategically important products placed on the market, change of market share, divergences

from budget, etc. Therefore, if a company aims to register high profit for certain period of time, then the traditionally selected indicators can show this.

This situation can be explained, on one hand with the insufficient maturity of business in Bulgaria as a whole, and on the other hand with the obscure strategic goals of the companies. The absence of clearly formulated strategic goals is the first problem which managers have to solve by the definition of the most important success factors and the KPI for their measurement. If a company is oriented towards the development of its competition advantages (key success factors) in long term, then the traditional indicators just cannot serve this purpose. This problem affects mostly the large holding structures (transnational companies). Anyway, if an indicator cannot be calculated due to lack of the necessary information then it is unreasonable to include it in the BSC. The strategic goals of small and medium businesses in Bulgaria are usually short and long term development.

Let us consider examples for the implementation of BSC in Bulgarian companies Lukoil-Neftochim Ltd., Promet Inter Trade Ltd, Elkabel Co.

Lukoil-Neftochim Ltd. The project for the implementation of BSC started in 2008. By the end of 2016, the project was fully configured – BSC has three-level structure (company level, division level, department level – managerial and functional groups); total number in the basket – more than 50, indicators – more than 600. Such large number of indicators can be explained with company size and the multi-layer system of functional groups. The indicators at the different levels are interrelated by decomposing mechanisms and causal relationships. The general results are: target systematization, improved manageability of the company, organization of the control for business development.

Promet Inter trade Ltd. Together with the problems of the company strategic management, systems for operative risk management, operative accounting and corporative integrated system were also implemented. In each of these systems, BSC poses its requirements and defines KPI to obtain reliable and transparent information for modern decision making process. The result: a system for strategic management (three level structures) was developed and implemented, which allows the top-managers of Promet Inter Trade Ltd guiding the successful

realization of the strategies and improved transparency of company management.

Elkabel Co. The BSC based concept of strategic management affects the mechanism of elaboration, implementation, monitoring and corrections of the strategy and determines the further steps for the improvement of the strategic management system: a complex of measures aiming to improve the different managerial subsystems like system for budget planning, analysis of financial activities, motivation. The result is improved company strategy and targets, elaboration of basic company documentation allowing the implementation of a complete system of company management, as well as flexible and effective personnel motivation system.

How BSC helps the strategic controlling? The answer to this question would help define the aims and tasks of the strategic controlling which guarantees for the long lifetime of the company. The strategic controlling on one hand is the activity of company personnel and on the other hand – the building of an infrastructure (production, system, instrumentation, formalized process of collection, processing and analysis of data) to maintain the strategic planning. A process of co-ordination of the activities within the company is required. Special attention to these functions of controlling paid the German theoretician Prof. Hans-Dietrich Kupper [6] who sustains the opinion that they are of prime importance for the business.

Let us define the tasks of the strategic controlling with regard to the so called controlling plan (Controlling-Konzept). The tasks of the strategic controlling include: [3]

- Strategic planning;
- Strategic control;
- Differentiation between strategic and operative control.

An important issue is the close relationship between strategic and operative controlling. It must show the transformation of the strategic goals in the operative planning according to the actual potential of the company.

Strategic planning (Fig.1)

The aim of the strategic planning is the elaboration of a competitive strategy where controlling holds the responsibility for the orientation of the planning process.

The separation of controlling from the strategic management is determined mainly by its scope. Using the controlling subsystem, all the

necessary data are collected preliminarily. Based on this information, the company managers take the proper decisions. In this respect, the controlling tasks turn out to be in the field of analysis of

the data on company branch development, as well as preparation for future changes. As a result, the company strategy is formed and corrected.

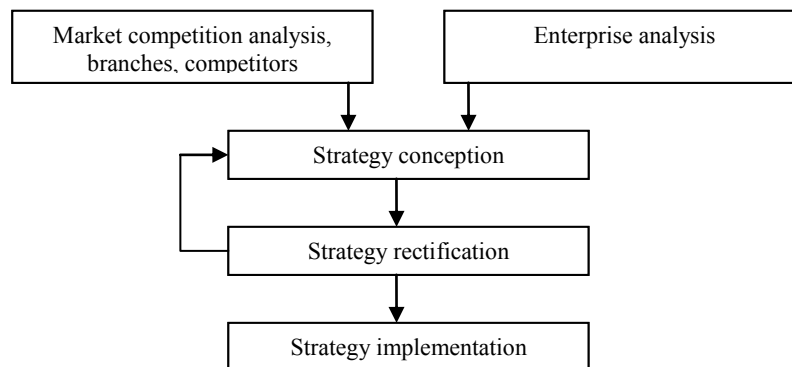


Fig.1. The process of strategic planning

Strategic control

The strategic control has two main goals. First – it must ensure the lack of changes in the strategic targets. If the divergences tend to increase, corresponding counter-measures should be undertaken. Second – the strategic control must assess the planning process on regular basis. At registration of significant changes in external and internal environment, the strategies carried previously out will hardly be adequate.

Under such conditions, the correct strategic planning is questioned and by negative answer – the strategic goals should be changed.

The differentiation between strategic and operative controlling and the differences between them are illustrated in Table 1. To discuss the efficiency of controlling, it is necessary first to determine the policy of operative accounting which provides the data for the strategic controlling. [3]

Table 1 Differences between operative and strategic controlling

	Strategic controlling	Operative controlling
Orientation	External environment and company	Company (taking into account the external environment)
Target values	Securing the existence, potential for success	Economy, profitability
Planning	Strategic planning, long term orientation	Operative planning – short-term and medium-term plan
Measurable values	Opportunities/risks, strong and weak issues	Price (income, maintenance), productivity, cash inflow
Information sources	Basically external	Basically internal information

BSC is not only an instrument to bring a strategy into reality and a way to assess the efficiency in the achievement of strategic goals, but also basic instrument of the strategic control. BSC clearly formulates strategic goals and critical factors for the success of each goal which are measured by certain indicators. [4]

Along with the many BSC users, there are a small number of companies where the expectations with regard to BSC are only partially fulfilled. In the cases where the expectations are higher or mistakes were made in the planning, The BSC projects often fail since BSC is not

fully integrated in business activities. This was the problem with Europetrol Ltd. [5] After the successful initial stage of implementation of BSC, a danger of failure appeared: the documents were filled-in only formally and then forgotten. In a reaction, a controlling plan for BSC management was elaborated in the company where communication, assessment, regulation and improvement of the BSC system set for a long term until realization of its full potential.

Fig.2 shows a scheme of the controlling plan and detailed description of functions. [5] It

consists of three main sections each of them contains two subsections.

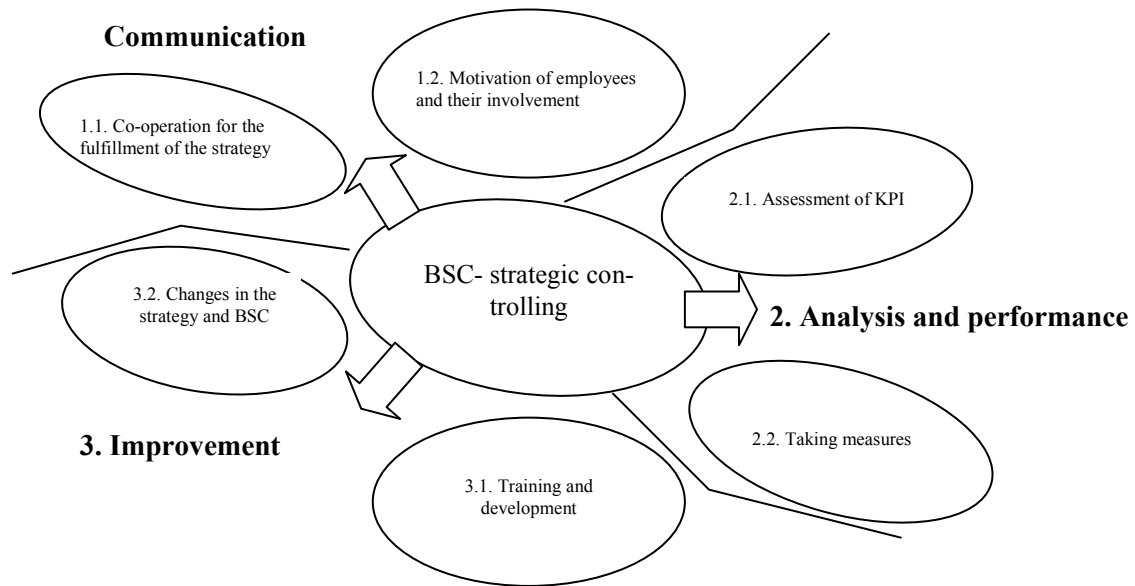


Fig.2. A scheme of the controlling plan

The sections contain:

1. Communication.

Company personnel must be informed for the achievements of targets and the use of BSC in operative activities. It poses two questions before the company:

- How the personnel can contribute for the fulfillment of the strategies and BSC?
- How the employees would include BSC in their work and how should they be motivated?

1.1. Co-operation for the fulfillment of the strategy.

The message (communication) of the company aims to create prerequisites for each division to collect the necessary data for its operation.

BSC creates a communication process, i.e. the understanding of the organization strategy by each employee should be enhanced and transformed into motivation for work.

Here, the following problem arises: how the strategy known to hundreds or even thousands of people could not be obtained by the competitors? To solve this problem, it is important to define exactly the amount of necessary information for the employees and the communication channels through which it will be delivered. According to R.Caplan and D.Norton [1, 2], it would be better to elaborate a communication plan for the strategy and BSC which must answer the

following questions:

- Who is responsible for the communication plan?
- What are the target groups?
For instance: worker, different levels of management, leaders, office, shareholders, etc.
- What information should be delivered to the individual target groups?
- How much information is necessary for each target group to perform according to the strategy?
- How the information should be delivered?
- How can the effect of the communication plan be measured?

1.2. Motivation of employees and their involvement

It is necessary to be sure that BSC and the strategy are in actively interaction and all the employees know the strategic goal which has to be achieved or one cannot guarantee uniform performance. Since the employees play major part in strategy transformation, they should be properly provided for and motivated. This is accomplished by the corresponding organizational measures (unambiguous management competences and responsibilities, section 2.2) as well as corresponding stimulation (financial stimulation system). To satisfy the requirements for transparency, fairness and savings, the management of Europetrol Ltd decided to implement a stimulation system Top-Down – vertical system from top level to low levels. This system improved the goals of BSC

for all levels of employees. The aims were formulated for each employee individually, and a reward system was announced for the degree of their achievement within the defined period of time. Besides, the stimulation system was first implemented at the top levels of management and then, if successful, is spread to the lower levels

2. Analysis and performance.

It should be assessed here what are the opportunities within the company, how can the collection and analysis of KPI be carried out and what measures should be undertaken for strategy renovation.

2.1. Assessment of KPI. The key performance indicators are the core of BSC. Despite the labor consuming collection and calculation of the indicators, the quality and correctness of strategy fulfillment are improved. Here, special attention should be paid the following issues:

- When and how often it is normal KPI data to be collected (delivered)?

The answer to this question depends mainly on the price and usability. On one hand, we have indicators with relatively low price available at any moment. An example is the KPI “financial perspective”. On the other hand – we can use some leading indicators “Clients” or “employee satisfaction”. It is established at high costs (questionnaires addressed to certain persons which have to fill them in and their assessment). Based on these calculations, it is not reasonable for such KPI to be measured on monthly basis since clients satisfaction does not change sharply from month to month. Longer period is usually required to see the developments, so in this case, the measurements are made on quarterly basis. Indicators calculated using questionnaires (clients, degree of employees’ satisfaction) are an exception and they could be calculated annually.

- Who is responsible for the calculation and assessment?

Each KPI “needs” a competent employee who will collect the data and take responsibility for the achievement of certain values.

2.2. Taking measures.

The regular calculation allows for incessant monitoring of the degree of strategy transformation. Besides, it can easily be seen whether the performance is at the level required or new measures must be taken to reach the targets. The responsibility here is not only on the managers but also on their assistants.

Two kinds of strategic measures aimed to

maintain the target values can be distinguished here: [2]

- Under continuous improvement of the target values achieved, the existing process is constantly optimized. This is usually connected with comparatively low financial and labor expenses. For instance: shortening the periods of planned repairs, employee training.

- If the measures for the process of continuous improvement appear to be insufficient, then new radical transformations should be designed. They are usually connected with high expenses – financial, time and labor. Example – decrease of excess in-store reserves by implementation of new programs, new design of the inventory process. The measures are usually designed as projects with responsible persons and terms of realization. These data can also be found in BSC.

Within large projects with of financial and labor expenses lasting for longer periods of time, another verification instrument is required. In such cases, the controlling system itself is brought into action for the commensuration of costs and results which cannot be obtained from BSC. The basis is monthly monitoring of changes, planned measures and the degree of their accomplishment, as well as the expenses required by these measures.

3. Improvement

The third part of the controlling plan is devoted to the ensuring of continuous improvement of both the strategy and BSC.

3.1. Training and development.

BSC is based in favorable training climate. Training climate involves constructive perception of mistakes and unsatisfactory standings. Only the open and trustful corporative culture present in the company facilitates the prevention of mistakes in the future. To create such a climate, it is necessary to stimulate the employees take part in the elaboration of decisions. A KPI may be introduced to account for the amount of suggestions for improvements and which could allow monitoring the dynamics of changes. The indicator allows obtaining an approximate estimation and tendency of empathy of the employees in the process of decision making.

3.2. Changes in the strategy and BSC.

Some ad hoc improvements are necessary to make BSC stable enough. The BSC users must check the improvements within the regular surveys to guarantee the actuality.

CONCLUSION

The regular design and development of BSC could not meet the expectations if the employees do not understand the system, certain goals and the strategy are not well defined, KPI do not register the targets achieved, etc. BSC is not panacea but it could be an effective instrument of the strategic controlling. [9] In Bulgarian businesses, there are three elements in the system (instead of the five in German companies): planning, control, provision of information. The second element can be represented by BSC not just for primitive comparisons plan – fact but to watch the tendencies in process development, assess the efficiency, stimulate the employees by specific moves and, finally, achieve the strategic goals using such a system.

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THE UTILIZATION OF RESOURCES FROM EU STRUCTURAL AND COHESION FUNDS BY BULGARIAN MUNICIPALITIES AS A FACTOR FOR ATTRACTING FOREIGN DIRECT INVESTMENT

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ABSTRACT

The purpose of the article is to determine the relationship and correlation parameters between the public funds absorbed by Bulgarian municipalities in the process of implementation of four operational programmes of EU funding during the period 2007-2017 as a factor of the business environment development in Bulgaria that fosters growth of foreign direct investment in the country for the same period. Official statistical data is used as well as the Information System for Management and Monitoring of EU Structural Instruments based online National Institute of Statistics, Ministry of Finance, Bulgarian National Bank, National Association of Municipalities, etc.

Keywords: foreign direct investments, hospitality of investment environment, investment climate, operational programmes of EU structural funds, verification and amount of actually absorbed funds

JEL: H810, H830, H890

INTRODUCTION

Foreign direct investments are a source of financing of the existing deficit in the current account of balance of payments as it does not create any additional debt. The growth of foreign investments, in combination with the internal investments, leads to improved macroeconomic equilibrium. The attraction of foreign investment in the Bulgaria is a result of the economic development and the availability of profitable investment opportunities. According to Mladenova and Chobanov net cash flows from foreign direct investment (FDI), which increase the accounting gross domestic product (GDP) in the country, are a beneficial factor for economic growth and the accumulation and creation of capital – physical, human and institutional – which determines the increase of labour productivity. Technical innovation and accumulation of capital in the economy are financed through savings, i.e. the postponement of today's consumption in order to invest in cost-effective production and future consumption and attract savings from foreign economies, i.e. attraction of foreign investments[1].

EXPOSITION

The increase of Foreign Direct Investments (FDI) flows in our country is also under the

combined impact of a number of factors, such as privatisation, the stability of the currency board, and the financial system as a whole, the regulation of legal provisions, tax policy, etc., that are part of the traditional determinants, determining the hospitality of the investment environment and the behaviour of foreign investors. Bulgaria's membership in the EU and the integration processes increase the confidence of overseas investors in the potential of the Bulgarian economy too. Foreign investors still find overwhelming the bureaucratic, licensing and in some cases corrupt practices, as well as the antiquated infrastructure of the country[3]. The share of foreign direct investment, tracked with accumulation since 2004 up to 2010 and expressed as a percentage, shows big differences in the areas of level 2: North-Western District – 2.32%, in the North-Central District – 3.69%, in the North-Eastern District – 9.51%, in the South-Eastern District – 12.34%, in the South-Central District – 7.50%, in the South-Western District – 64.64 %. The North-Western and North-Central districts are significantly lagging behind other districts, the North-Eastern and South-Eastern districts are relatively well but the South-Western district surpasses all other districts together almost twice.

The uneven distribution of FDI and investment in fixed assets by area of level 2 in the country

was retained in recent years. This is due to its concentration in heavily urbanized, areas with well-developed infrastructure, near the capital and major cities in the districts. There is a clear differentiation between the development of the capital city and the other districts in the areas[2].

Bulgaria's membership in NATO and the EU, the fixed exchange rate of the national currency with respect to the euro, the favourable tax rate, geographical location, climate, nature and a number of other factors contribute to shaping an environment conducive to investment. An important policy priority in the field of development of investment still is the reduction of the administrative and regulatory burden and the creation of good conditions for investment for local and foreign enterprises. Correlation analysis

In statistical research the relationship between two random variables is considered in two aspects – correlation analysis and regression analysis. The degree of dependency between the two variables is shown by the first and if proven to be significant the application of regression analysis is proceeded to.

Correlation analysis is one of the methods used for the processing of statistical data. The correlation coefficients between one or more pairs of variables are compared for a relationship between them to be established. The correlation coefficient of Pearson is one of the most widely used indices of rectilinear relationship. It takes values from -1 to 1, as in the cases in which it is equal to 0 there is no correlation, i.e. there is no linear relationship between the variables. One of the common interpretations of the coefficient is as follows:

- 0 < R < 0,3 – weak correlation
- 0,3 < R < 0,5 – moderate correlation
- 0,5 < R < 0,7 – considerable correlation
- 0,7 < R < 0,9 – high correlation
- 0,9 < R < 1 – very high correlation

For the purpose of this study, this model will help us demonstrate the existence of a degree of connectedness between the actually paid funds to municipalities under the four operational programmes – Operational Programme Environment 2007-2013 (OPE), Operational Programme Regional Development 2007-2013 (OPRD), Operational Programme Human Resources Development 2007-2013 (OPHRD), Operational Programme Administrative Capacity 2007-2013 (OPAC) and the amount of foreign direct investment by districts in the country for the period 2007-2015[4].

The analysis is carried out on the level of administrative and territorial units of Bulgaria – NUTS 3 districts. As Burgas district is concerned, it ranks first among all in terms of utilized funds from OPE. Here, the degree of correlation between the utilized funds in the programme and FDI in the district is 0.55, indicating the presence of considerable correlation. With OPRD the coefficient is even higher – 0.75, i.e. high correlation is present here. Unlike these two programs, with OPHRD and OPAC things are totally different with a coefficient of 0.24 and – 0.13, which indicates weak correlation with the first programme and weak negative correlation with the second.

The values are even higher in the district ranking second in terms of utilized funds from OPE – Plovdiv, where the degree of correlation between the actually paid funds under OPE and FDI is 0.61, and in OPRD – 0.93, showing a very high degree of correlation. Unlike Burgas district, the degree of correlation with respect to the amounts under OPAC is 0.64 in Plovdiv district, i.e. the correlation is considerable.

One of the districts with negative degrees of correlation is Sliven. After the growth of FDI from 107,846.80 thous. Euro in 2007 to 558,503.20 thous. Euro in 2009 a serious decline was observed, starting in 2012, when the values fell to 107,482.60 thous. Euro and continued to go down each subsequent year reaching 90,251.50 thous. Euro in 2015. Simultaneously, these are the years with the biggest amount of actually paid funds under the programmes to municipalities in the district. The degree of correlation here is negative in each case:

- for OPE – moderate negative correlation (-0.34);
- for OPRD – weak negative correlation (-0.20);
- for OPHRD – moderate negative correlation (-0.38);
- for OPAC – moderate negative correlation (-0.41).

Yambol, the district neighbouring Sliven, is one of the districts in Bulgaria having reported highest rate of growth of FDI for 2015 as compared to 2007. With OPE and OPRD the correlation coefficient here is moderate, while with OPHRD and OPAC it is significant, that is, the relationship of FDI in the district with the actually paid funds from both programmes implementing mainly socially targeted projects is higher than in the case of programmes targeted to infrastructure.

Degree of correlation between actually paid funds under operational programmes and foreign direct investment

Table 1

District	Degree of correlation			
	OPE	OPRD	OPHRD	OPAC
Blagoevgrad	0,73	0,56	0,69	0,65
Pazardzhik	0,58	0,77	0,84	0,66
Sofia district	0,50	0,61	0,62	0,41
Kyustendil	-0,12	0,80	0,75	0,47
Pleven	0,91	0,77	0,83	0,70
Dobrich	0,16	0,78	0,51	-0,25
Silistra	0,45	0,27	0,10	0,41
Targovishte	0,34	0,55	0,63	0,58
Razgrad	0,02	0,37	0,59	0,37
Ruse	0,22	0,44	0,54	0,65
Veliko Tarnovo	0,71	0,35	0,29	0,66
Smolyan	0,06	0,23	0,05	0,20
Gabrovo	0,34	0,47	0,65	0,25
Haskovo	-0,44	-0,52	-0,70	-0,50
Stara Zagora	0,94	0,93	0,90	0,52
Lovech	0,57	0,67	0,72	0,49
Vratsa	0,15	0,30	-0,47	0,20
Vidin	0,70	0,47	0,23	0,17
Kardzhali	0,71	0,60	0,57	0,91
Pernik	0,03	-0,19	-0,38	-0,60
Plovdiv	0,61	0,93	-0,29	0,64
Varna	0,47	0,32	0,45	0,33
Yambol	0,44	0,40	0,60	0,51
Sliven	-0,34	-0,20	-0,38	-0,41
Montana	0,63	0,85	0,79	0,58
Burgas	0,55	0,75	0,24	-0,13
Shumen	-0,14	-0,50	-0,40	-0,20

Of the 27 considered districts, when indicators of Sliven, Shumen and Haskovo districts are compared, results are negative, indicating an inverse relationship between the two variables, i.e. when the first increases, the second one decreases. The sign is negative in the district of Pernik too, as well as partially in several other districts. Unlike these results, in four other districts: Pazardzhik, Pleven, Stara Zagora and

Montana, results show mainly considerable or strong correlation relationship.

The results obtained show that only in 19% of the cases the correlation relationship is negative, which itself can be the basis for reaching the conclusion that there is a correlation between the actually paid funds under the operational programmes in question and FDI in Bulgaria.

REGRESSION ANALYSIS

Unlike correlation analysis, which provides information about the strength of the correlation relationship between the two studied variables, in regression analysis information about the nature of this relationship is inferred.

By means of the Regression function of Data Analysis, data from districts in Bulgaria were processed by years, as in this case it was assumed that the amount of funds actually paid in the period 2007-2015 from the following operational programmes: Operational Programme Environment 2007-2013, Operational Programme Regional Development 2007-2013, Operational Programme Human Resources Development 2007-2013 and Operational Programme Administrative Capacity 2007-2013 is the factor variable X and the amount of FDI in Bulgaria for the same period is the resultant variable Y.

Table 2

SUMMARY OUTPUT

<i>Regression Statistics</i>	
Multiple R	0,754563
R Square	0,569366
Adjusted R Square	0,507846
Standard Error	1248,096
Observations	9

The Summary output table provides information on the correlation coefficient of Pearson (Multiple R), the coefficient of determination (R square), adjusted coefficient of determination (adjusted R square), the standard error of the estimation (standard error) and the number of observations (observations). Analysis of the results shows that strong positive correlation is present and the coefficient of determination determines that in 56.9% of the cases the variance of the resultant variable Y can be explained by the variance of the factor variable X.

The next part of the test includes Analysis of Variance and is divided into two main parts: test of the significance of the regression model and details of the coefficient of the regression equation and their statistical significance. (Table 3) The resulting empirical value (F_{emp}) is equal to 9.26. The tabular value from the Appendix of critical values of the F-criterion of Fisher with level of significance 0.05 is equal to 5.59. Thus the data obtained show that $F_{emp}=9.26 > F_{0.05}=5.59$, which means that the relationship is statistically significant.

Data indicating the statistical relationship of the coefficients of the regression equation are contained in the Table 4. The column Coefficients provides the values of the

coefficients a and b. The free term a equals 7824.29. Its corresponding value of Student's t-criterion using (t Stat) 12.34 and the level of significance (P-value = 0.00), which is smaller than 0.05, show that the free term a is statistically significant. The angular coefficient b equals 6.21. Its level of significance is 0.02, which again indicates presence of statistical significance, because it is smaller than 0.05. Based on the value of the coefficient b = 6.21 it can be concluded that an increase in the size of the actually paid funds under the operational programmes (factor variable X) by one unit results in an increase of FDI in Bulgaria (resultant variable Y) by 6.21 units.

Table 3

	<i>df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>
Regression	1,00	14417048,92	14417048,92	9,26	0,02
Residual	7,00	10904198,79	1557742,68		
Total	8,00	25321247,71			

Table 4

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95,0%</i>	<i>Upper 95,0%</i>
Intercept	7824,29	634,27	12,34	0,00	6324,48	9324,10	6324,48	9324,10
X Variable 1	6,21	2,04	3,04	0,02	1,38	11,04	1,38	11,04

Table 5

RESIDUAL OUTPUT			PROBABILITY OUTPUT		
<i>Observation</i>	<i>Predicted Y</i>	<i>Standard Residuals</i>	<i>Percentile</i>	<i>Y</i>	
1	7824,29	-1879,91	-1,61	5,56	5944,38
2	8059,35	-546,25	-0,47	16,67	7513,10
3	8272,59	-379,42	-0,32	27,78	7893,17
4	8798,50	849,13	0,73	38,89	9647,63
5	8586,06	1472,31	1,26	50,00	9906,35
6	9132,66	1114,35	0,95	61,11	10058,37
7	11169,88	95,84	0,08	72,22	10247,01
8	11392,88	-1486,53	-1,27	83,33	11051,48
9	10290,98	760,50	0,65	94,44	11265,72

The last table (Table 5) shows the numbers of observed statistical units, the theoretical value of the resultant variable; residuals and standardized residuals of the regression and the percentages of confidence intervals and their corresponding empirical values Y.

CONCLUSION

The analysis shows that a positive relationship and dependence between funds acquired by Bulgarian municipalities under various operational programmes and the changes in the levels of FDI in recent years are present. This relationship could be explained by the fact that a major percentage of EU funds is targeted at improving road, education, cultural and health infrastructure and increasing the qualification of administration – factors having no small influence in decision-making on the part of investors. The accumulated experience and capacity in work on European projects by municipalities, as well as supplemented opportunities, provided by programmes in the new programming period 2014-2020, are a requisite guarantee for investment growth and continued pace of development and growth of the economy. As long as sectors are concerned 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[4].

Foreign direct investment, as a result of the accelerated international capital movement, will bring about a positive impact on national economies not only through growth in production, consumption and employment, but through exchange of know-how, experience and knowledge too. Therefore, in an effort to improve the competitiveness of the economies, countries develop increasingly active policies for attraction of foreign investment and securing a timely investment environment. As main administrative and territorial units in the country, Bulgarian municipalities, following the national policy, develop individual plans and programmes aimed at determining the steps and guidelines to ensuring a good investment climate. A strong factor are the local logistic and industrial zones in the districts of Sofia, Plovdiv, Stara Zagora, Ruse, Burgas etc. In order to achieve this working in two main aspects is necessary: understanding the processes of international capital movement and the factors affecting the investment environment, as well as availability of financial resources for the development of

some of these factors. The limited budgetary resources are the first obstacle in front of municipalities in this mission of theirs and their admissibility as beneficiaries under EU structural instruments is one of the possibilities for overcoming this barrier. That is why European funds are some of the tools of municipalities to achieve an attractive outlook for investors.

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THE INFLUENCE OF UNEMPLOYMENT ON ECONOMIC GROWTH IN BULGARIA

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ABSTRACT

The main purpose of this paper is to study the relationship between unemployment and economic growth at the national economy level. The Okun coefficient in Bulgaria was assessed by applying the differential approach. The applied econometric models support the versions of Okun's law, which are less time-limited and include dynamic dependencies.

Key words: unemployment, economic growth, Okun's Law.

INTRODUCTION

The main purpose of this paper is to study the relationship between unemployment and economic growth at the national economy level, in particular, what will be the effect on the volume of output when changing the unemployment level. As we know, this link is important for the effective implementation of macroeconomic policies.

MATERIALS AND METHODS

Okun's Law can be expressed in the so-called gap version and differential version. In the present study, a differential version was applied, in which chain indexes were calculated against a previous period (on a variable basis). This approach allows to better trace and analyze the individual subperiods of the ups and downs of the macroeconomic activity of the European economy (Pyrimova, 2007).

The Okun's Law is expressed by the following formula:

$$\frac{Y - Y^*}{Y^*} \cdot 100 = \alpha(u - u^*) + \omega$$

where Y is the current real GDP, u is the current unemployment rate, α is the coefficient of Okun, ω is the error term, and * indicates the long-run level.

If we take the differences in the magnitudes in both sides of equality (1) and assume that the natural level of unemployment u^* is constant and the potential output grows with a constant rate, we will get:

$$\frac{\Delta Y}{Y} \cdot 100 = \alpha \Delta u + \beta + \varepsilon.$$

Here Δ is the change from the previous period and $\varepsilon = \Delta \omega$.

Formula (2) expresses the correlation between the change in the unemployment rate and the growth rate of aggregate production. The coefficient α expresses the sensitivity with which the volume of production changes as the level of unemployment changes. If we set $\Delta u = 0$, we will get:

$$\frac{\Delta Y}{Y} \cdot 100 = \beta$$

Consequently, the β coefficient indicates how much real GDP will change if unemployment remains at the same level (compared to the previous period). If we set $\Delta Y = 0$, we will get: $\Delta u = -\beta / \alpha$. Consequently, the expression $(-\beta / \alpha)$ shows the change in the level of unemployment, the real GDP remains constant.

In the examined model, we chose unemployment as an independent variable, unlike Okun's original article, where it is a dependent variable. As stated by Barreto and Howland [1], this regression is used when the goal is to predict the level of production when unemployment is changed.

A modern market economy can be represented as a system that functions under the influence of mutually balancing forces of demand and supply of free competition [2]. From this point of view, unemployment is characterized by the distorted equilibrium of the

labor market, where the supply of labor exceeds its demand.

Different studies [3-8] show that the absolute value of the Okun's coefficient, originally considered to be close to 3, varies considerably over time and across the different phases of the economic cycle, also depends on the applied patterns and can be quite different. The Okun's coefficient depends on many factors and these factors vary from country to country, so it is very likely that the Okun's coefficient will also vary from country to country.

The specific quantitative relationship between unemployment and economic growth as expressed in the above formula is assessed and analyzed using econometric models applied at the national economy level using quarterly data. Further we will use the following symbols: $UmR = \Delta u$; $GrR = \Delta Y.100 / Y$.

RESULTS AND DISCUSSIONS

Firstly, the relationship between unemployment and economic growth in Bulgaria has been examined by applying Okun's law in a differential form. Quarterly real GDP data (Chain linked volumes (2010), million euro) and the unemployment rate in Bulgaria for the 2000Q1-2017Q3 period were used. The differences in magnitude (i.e. ΔY , Δu) are relative to the previous quarter.

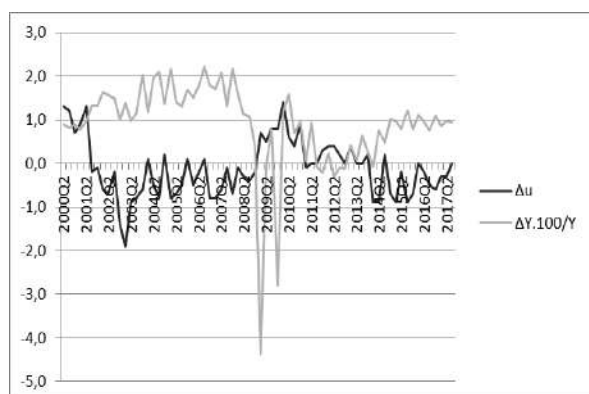


Figure 1. Comparison of GrR and UmR for Bulgaria for the period 2000Q1-2017Q3 (change compared to the previous quarter)¹.

Source: Eurostat, own calculation.

The results of the regression analysis performed are presented in Table 1.

Table 1. The results of regression analysis for the variables: GrR (dependent variable); UmR (independent variable).

	Coefficient	Std. Error	t-Statistic	Prob.
α	0.820584	0.114220	7.184240	0.0000
β	-0.579574	0.172727	-3.355436	0.0013

The numerical value of the Durbin-Watson coefficient is equal to $d = 1.428435$. Comparison of empirical and theoretical values reveals autocorrelation, because $d < dL = 1,583$, ($dL = 1,583$; $dU = 1,641$).

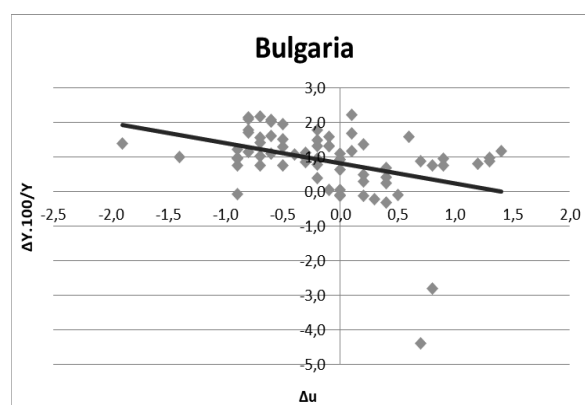


Figure 2. The relationship between unemployment and economic growth in Bulgaria for the period 2000Q1-2017Q3 (linear regression model).

The Breusch-Godfrey test (LM Test) for a higher ranked serial correlation shows that we can assume the zero hypothesis of second-order autocorrelation.

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	3.672689	Prob. F(2,66)	0.0307
Obs*R-squared	7.010345	Prob. Chi-Square(2)	0.0300

To remove autocorrelation, a new regression model has been built up, which includes variables that reflect lags meanings of a part of the variables (dynamics of the model). The new specification of the regression equation is as follows:

$$GrR_t = \alpha_1 UmR_t + \alpha_2 GrR_{t-1} + \beta + \varepsilon$$

The results of the regression analysis are presented in Table 2.

¹Time lines are seasonally adjusted.

Table 1. Results of regression analysis for variables: GrRt (dependent variable); UmRt, GrRt-1 (independent variables).

	Coefficient	Std. Error	t-Statistic	Prob.
α_1	-0.444384	0.189489	-2.345170	0.0220
α_2	0.277660	0.118585	2.341442	0.0222
β	0.579240	0.147407	3.929526	0.0002

The results obtained are better than those in the previous regression equation. The coefficient of determination is higher, and the standard error of regression and the sum of squared residuals are lower. The result obtained for the F-statistic is 9.17 with P-value = 0.00 ... DW's statistics in this case is invalid because the dependent variable is included as an explanation with lag 1.

To test the existence of first-order serial correlation we use the Breusch-Godfrey test. The results obtained are presented in Table 3. The conclusion is that in this case we can accept the null hypothesis for lack of autocorrelation in the residues. Consequently, the reason for autocorrelation in the static model of the studied dependence is the non-inclusion of variables that take into account the dynamics of the relationship between the level of unemployment and economic growth. The assessment of the presence of heteroscedasticity is made by the Breusch-Pagan-Godfrey test. Heteroskedasticity occurs when the residual dispersion (error) in the regression model is not a constant magnitude. The test results presented in Table 3 give grounds for assuming the null hypothesis of homoskedasticity.

Table 3. The test results for serial correlation and heteroscedasticity.

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	1.665909	Prob. F(2,64)	0.1971
Obs*R-squared	3.414365	Prob. Chi-Square(2)	0.1814

Heteroskedasticity Test: Breusch-Pagan-Godfrey

F-statistic	0.117368	Prob. F(2,66)	0.8894
Obs*R-squared	0.244536	Prob. Chi-Square(2)	0.8849
Scaled explained SS	0.185330	Prob. Chi-Square(2)	0.9115

According to the data in Table 3, the dynamic regression model and the regression coefficients are statistically significant. The coefficient α_1

before the UmR_t variable expresses the power of reaction to aggregate production at a change in the unemployment rate. Therefore, the Okun's coefficient for Bulgaria is equal to $\alpha_1 = -0.44$. The coefficient $\alpha_2 = 0.28$ in front of the variable GrR_{t-1} expresses the sensitivity of a change in the volume of production in the current quarter compared to the changes in this indicator in the previous quarter. The interpretation of coefficients of the regression equation shows that if the unemployment rate increases by 2 pp and the change in production volume in the previous quarter is zero ($GrR_{t-1} = 0$), the current real GDP will increase by 0.31% ($\alpha_1 + \beta = -0.31$). In this case, in order to increase the GDP by 1%, it is necessary for the unemployment to decrease by 3,55 pp.

CONCLUSION

The focus of this study is to evaluate the Okun's Law in Bulgaria by applying the differential version. In this study, the dynamic form of Okun's law is used, in which the change in production volume in the current period depends on the change in the level of unemployment in the current period and the rate of economic growth in the previous period.

Applied econometric models support Okun law versions that are less time-limited and include dynamic dependencies. The results obtained have a practical application as well. For example, predicting the unemployment rate by Okun's law improves considerably, taking into account the dynamic relationship between unemployment and output growth.

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THE LEVEL AND DYNAMICS OF REMUNERATION IN THE TOURISM SECTOR IN BULGARIA

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ABSTRACT

The main purpose of this work is to investigate the level and dynamics of remunerations in the sector of tourism (hotel and restaurant industries) in Bulgaria. A comparison with the national average wage has been made. The influence of the seasonal factor on the remunerations both in the field of tourism and on a national level has been studied. A forecast for the level of the average wage in the sector of tourism and on average in the country has been made by means of an appropriate econometric model.

Key words: average wage, tourism, seasonal factor.

INTRODUCTION

The problems related to the level and dynamics of the remunerations are of the utmost importance from both theoretical and practical points of views. The diversity of factors with their changes logically leads to a dynamic in a variety of processes and activities, which necessitates timely and thorough analysis [1]. On the one hand, the remunerations in the sector of tourism are comparatively low compared with the average remunerations for the country. On the other hand, one of the major problems not only for Bulgaria, but also for the European Union, is the shortage of qualified labour force and the existing structural professional imbalances in labour demand and supply. A number of studies show that this problem will continue to be aggravated in the future. The problem is exacerbated by the relatively high share of grey economy in the tourism sector and the seasonal nature of employment in this economic activity, which is produced by the seasonal consumption of the tourist product. In this regard, in case of surveys among aparthotel managers, it appears that even the owners of tourist properties rarely stay outside the active tourist season [4]. The shortage of qualified labour threatens the development of the tourism sector and demands that the firms should develop and implement long-term strategies to take control of this problem. One of the possible

solutions in this respect is offering relatively high remunerations and social benefits to highly qualified professionals, which helps to retain them within the organization and/or attract the necessary labour force from the external labour market.

In this regard, it is extremely useful to make an assessment of the level and dynamics of remunerations in the sector of tourism and a comparison with the average wage for the country. The objective study and analysis are necessary so that measures can be taken in order to increase the positive influence and minimize the negative impact [2].

MATERIALS AND METHODS

Modern market economy, and more specifically the labour market, can be seen as a system which is complex and self-regulating, functioning under the impact of two counterbalancing forces - demand and supply [3]. From this perspective, the equilibrium of the labour market determines the average wage.

The main purpose of the present study is to research the level and dynamics of average monthly gross wages in the economic sector "Hotels and restaurants" in Bulgaria.

The main tasks the present paper will approach are as follows:

- To examine the level and dynamics of the average wage in the tourism sector in Bulgaria;
- To be made a comparison with the average wage level in the country.
- To investigate the seasonal fluctuations in the remunerations;
- To identify the main trends related to the dynamics of remunerations and the changes expected in the short term;
- To present the main conclusions and results obtained in the process of studying the development of the economic indicators in the course of time.

With a view to achieving better targeting, the present study has the following limitations:

- The period for which information is presented is 2008I- 2018VI;
- The data used are for the number of persons employed at the end of the month and for the average monthly gross wage of the persons employed in the economic activity “Hotels and restaurants“ in Bulgaria;
- The study is based on official and publicly available information.

The main methods applied are: comparative method, factor analysis, visual fit approach, the expert judgment method.

RESULTS AND DISCUSSIONS

Figure 1 presents the dynamics of the average monthly wages of the persons employed in the tourism sector (Hotels and restaurants) as well as in the whole of the country, data courtesy of the National Statistical Institute (NSI) [6].

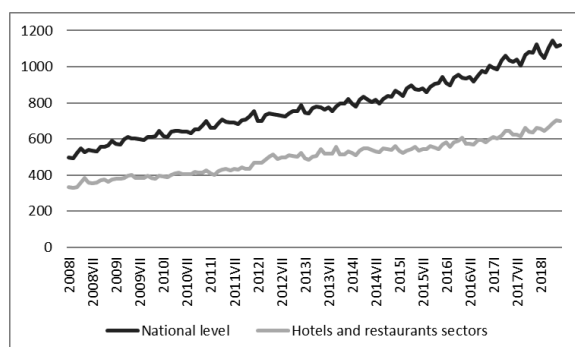


Fig. 1. Average monthly wages of the persons employed in the tourism sector as well as in the whole of the country for the period 2008I- 2018I. Source: National Statistical Institute.

Source: National Statistical Institute.

* 2017-2018 – preliminary data.

As can be seen in fig. 1, the average wage in the tourism sector was at its lowest at the beginning of the period studied - 2008II (329 BGN), and at its highest – at the end of the period studied - 2018V (705 BGN), i.e. there was a twofold pay rise. The graph clearly shows the seasonal fluctuations of the average remunerations.

During the period studied the average wage in the tourism sector is always lower than the average wage for the country and the difference between the two indicators keeps growing. For example, in 2008I the difference between the average wage in the tourism sector and the average wage for the country was 167 BGN, in 2017I this difference was 382 BGN, and in 2018I it is 419 BGN. On average, the remunerations in the tourism sector are 286 BGN lower than the average remuneration for the country. During the survey period, the average monthly salary in the tourism sector is about 64% of the average monthly salary for the country. It is important to note that this regularity is not observed internationally, where the wages in tourism are above the average, and in some tourist activities the wages are more than 30% higher than the average for the tourism sector [5].

Figure 2 presents the difference between the average monthly wage in the tourism sector and the average monthly wage for the country for the period 2008I- 2018VI.

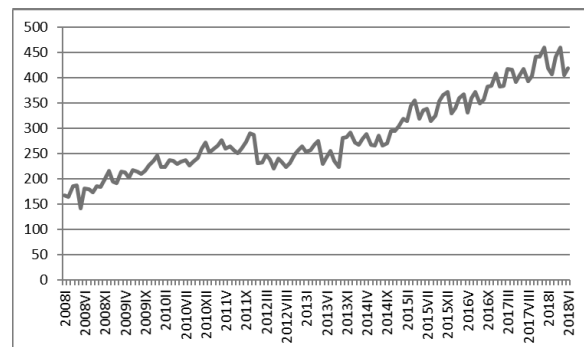


Fig. 2. Difference between the average monthly wage in the tourism sector and the average monthly wage for the country for the period 2008I- 2018VI (BGN). Source: National Statistical Institute, own calculation.

As can be seen in fig. 2, the biggest difference is in 2017XII (460 BGN), and the smallest – in 2008V (142 BGN).

The results of the seasonal decomposition of the average wage in the tourism sector are presented in fig. 3.

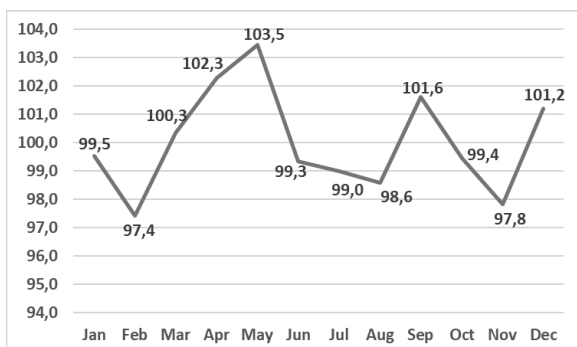


Fig. 3. Seasonal decomposition of the average monthly remuneration in the tourism sector in Bulgaria.

Source: National statistical institute, own calculation.

As can be seen in figure 3, the seasonal indices reached their highest value in May (103,5%) and April (102,3%), and their lowest value – in February (97,4%) and November (97,8). The deviation about the mean during the individual months is 6.1 percentage points.

The results of the seasonal decomposition of the average wage the average wage for the country are presented in fig. 4.

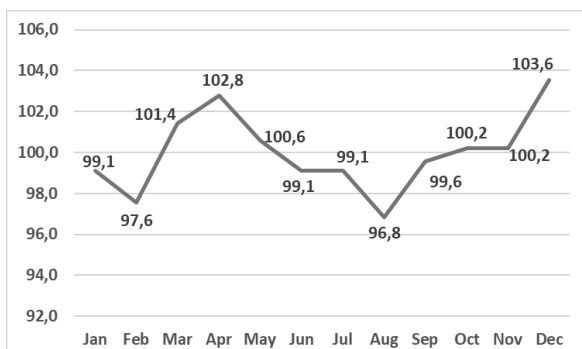


Fig. 4. Seasonal decomposition of the average monthly remuneration for the country.

Source: National statistical institute, own calculation.

As can be seen in figure 4, the seasonal indices reached their highest value in December (103,6%) and April (102,8%), and their lowest value – in August (96,8%) and February (97,6%). The deviation about the mean during the individual months is bigger in comparison with the results for the tourism sector - 6,8 percentage points.

As can be seen in fig. 3 and fig. 4, the seasonal factor influences the dynamics of the remunerations in the tourism sector and in the country in general analogically. In April the seasonal indices are high in the tourism sector and in the country, and in February the seasonal indices are comparatively low both in the tourism sector and in the country in general.

Table 1 shows the statistical estimates for the most suitable model for modeling the trend-cycle of average wage in the tourism sector.

Table 1. Statistical estimation of the different models describing the variation of the average monthly remuneration in the tourism sector in Bulgaria.

Model Summary and Parameter Estimates

Dependent Variable: Trend-cycle for Whr from SEASON, MOD_1, MUL CEN 12

Equation	Model Summary					Parameter Estimates			
	R Square	F	df1	df2	Sig.	Constant	b1	b2	b3
Linear	,979	5765,503	1	124	,000	337,959	2,226		
Logarithmic	,775	427,063	1	124	,000	160,354	87,903		
Inverse	,204	31,693	1	124	,000	515,421	-386,069		
Quadratic	,979	2906,817	2	123	,000	241,054	2,343		
Cubic	,981	2114,068	3	122	,000	330,784	3,369	,001	,000
Compound	,976	4969,041	1	124	,000	352,699	1,005		
Power	,802	613,072	1	124	,000	239,039	1,06		
S	,244	39,020	1	124	,000	6,232	-889		
Growth	,976	4969,041	1	124	,000	5,886	,005		
Exponential	,976	4969,041	1	124	,000	352,699	,005		
Logistic	,976	4969,041	1	124	,000	,003	,995		

Source: Own calculation.

According to the results obtained the coefficient of determination has the greatest value with the cubic (0,981) and the quadratic and linear models (0,979). All of the models are statistically significant. In this case the linear model has been chosen as the most adequate one [7]:

$$TC_{whr} = 337,959 + 2,226t$$

where TC_{whr} is the trend-cycle of average monthly wage in the tourism sector, $t=1,2,3,\dots,126$ (the number of months), ε -the error term (fig. 5). From the linear regression model obtained it follows that the remunerations in the tourism sector grow by 2 BGN per month on average.

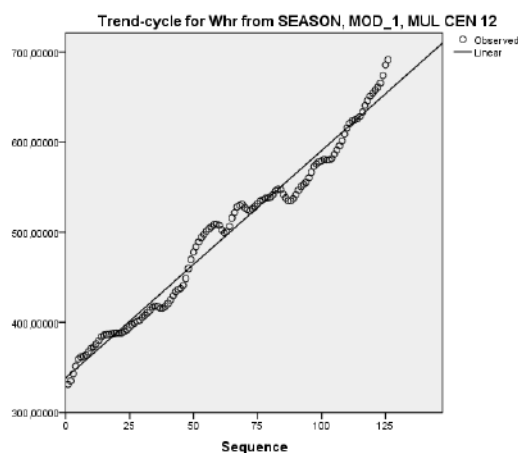


Fig. 5. Dynamics of the average monthly wage in the tourism sector in Bulgaria with removed seasonal and random fluctuations (linear regression model).

Source: Own calculation.

Table 2 shows the statistical estimates for the most suitable model for modeling the trend-cycle of the average wage for the country.

Table 2. Statistical estimation of the different models describing the variation of the average monthly remuneration for the country.

Model Summary and Parameter Estimates									
Dependent Variable: Trend-cycle for Wn from SEASON, MOD_2, MUL CEN 12									
Equation	Model Summary					Parameter Estimates			
	R Square	F	df1	df2	Sig.	Constant	b1	b2	b3
Linear	,982	6609,598	1	124	,000	501,570	4,450		
Logarithmic	,746	367,546	1	124	,000	206,093	151,203		
Inverse	,192	20,633	1	124	,000	813,352	-678,804		
Quadratic	,992	7893,841	2	123	,000	536,792	2,859	,014	
Cubic	,999	40045,866	3	122	,000	501,009	6,179	-,055	,000
Compound	,992	15329,476	1	124	,000	632,513	1,006		
Power	,628	698,977	1	124	,000	348,471	,204		
S	,243	38,738	1	124	,000	6,886	-,975		
Growth	,992	15329,476	1	124	,000	6,279	,006		
Exponential	,992	15329,476	1	124	,000	532,513	,006		
Logistic	,992	15329,476	1	124	,000	,002	,084		

As can be seen from Table 2, the cubic cubic model (0.999) is the most adequate, followed by the quadratic (0.992) and the linear model (0.982). All of the models are statistically significant. In this case the linear model has been chosen as the most adequate one [7]:

$$TC_{wn} = 501,570 + 4,45t,$$

where TC_{whr} is the trend-cycle of average monthly wage for the country (fig. 6). From the linear regression model obtained it follows that the average wage for the country grows much more substantially in comparison with that in the tourism sector – by 4,50 BGN per month.

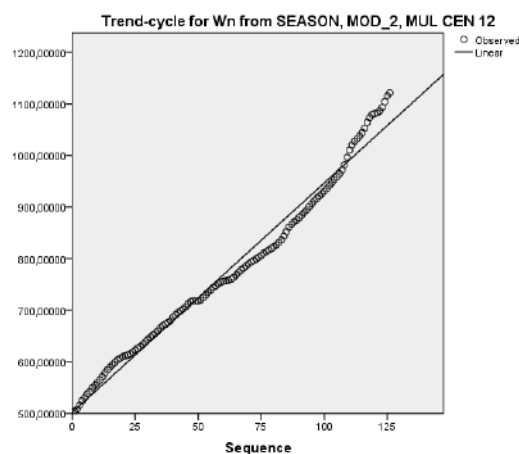


Fig. 6. Dynamics of the average monthly wage for the country with removed seasonal and random fluctuations (linear regression model). Source: Own calculation.

On the basis of the models thus obtained a forecast could be made for the values of the average monthly remuneration in the tourism sector and for the country as a whole during a succeeding period. The time horizon of the forecast is 24 months, i.e. about 20% of the length of the time series.

Table 3. Forecast values of average monthly remuneration in the tourism sector and for the country as a whole.

Month, year	Average monthly wage in the tourism sector	Average monthly wage for the country
JUL 2018	652	1057
AUG 2018	652	1037
SEP 2018	674	1071
OCT 2018	663	1082
NOV 2018	654	1087
DEC 2018	679	1128
JAN 2019	671	1084
FEB 2019	659	1071
MAR 2019	681	1118
APR 2019	697	1138
MAY 2019	708	1118
JUN 2019	682	1106
JUL 2019	682	1110
AUG 2019	682	1089
SEP 2019	705	1124
OCT 2019	693	1136
NOV 2019	684	1140
DEC 2019	710	1183
JAN 2020	701	1137
FEB 2020	689	1123
MAR 2020	712	1172
APR 2020	728	1193
MAY 2020	739	1171
JUN 2020	712	1159

Source: Own calculation.

Therefore, if we assume that the patterns found will continue to hold steady during the forecast period, then the average monthly wage in the tourism sector in Bulgaria will keep growing and will reach a value of 712 BGN (2020VI). However, this value is considerably lower than the forecasted average wage for the country during the specified month - 1159 BGN.

CONCLUSIONS

The following conclusions can be made from the analysis of the data presented:

- During the period studied the average remunerations in the tourism sector are always lower than the average wage for the country;
- The average monthly wage for the

country grows twice as fast as the average monthly wage in the tourism sector and this trend is very likely to remain steady in the short run.

- At the end of the forecast period (2020VI) the average wage in the tourism sector will be about 61% of the average wage for the country.

- The seasonal factor influences the dynamics of the remunerations in the tourism sector and in the country in general analogically.

It can be noted in conclusion, that the labour factor in the tourism sector is considerably undervalued, i.e. the price of labour is lower than the price of labour in other economic sectors, *ceteris paribus*. Of course, to prove this statement it is necessary to consider the existing specific conditions and peculiarities of the branch and to compare a whole lot of different economic values and indicators such as labour productivity, relative share of grey economy, etc. But an important indication of this is the fact that the average wage in the tourism sector is approximately 60% of the average wage in the country and its pace of growth is slower, and these negative trends are expected to remain the same in the short to medium term.

The growing shortage of qualified labour and the limitations it places on the potential of

development of the sector, requires that measures be taken so that the wages of the workers grow faster and equal the average values for the country.

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CONFLICTOLOGY FRANCHISING

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ABSTRACT

This paper discusses the controversies and conflicts in franchising. The aim is to present conflict system of controversies and conflicts in franchising, as well as guidelines for their settlement and management. The focus is on knowing and systematizing them.

Key words: *Franchising, controversies, conflicts*

INTRODUCTION

One of the contemporary forms of interaction between large, medium and small businesses is franchising [3, 117-121]. In practice, along with the positive aspects of this cooperation arise certain risks. The object of study is franchising, and its subject are franchising controversies and conflicts.

Approaches [6, 37-41]: conflictological and systematic.

Concept: the law of unity and struggle of opposites is used as a basis. Supply and demand of franchise generates a clash of interests between franchisors and franchisees reflected in their different positions reflected in their relationship. Their conflicting intentions - one to extract maximum profit from the provision of franchise package and the other - maximum profit from its use, occur in the purchase of the franchise. Key is the price and the determination of rights and obligations. Initial interaction between franchisor and franchisee candidate in the best case coordinates and aligns their contentions. Their common interest, which combines private interests in the franchise agreement is thus shaped. During the realization of contract, the relativity [7, 37] of dynamics of unexpected changes in the influence of different conditions and circumstances causes imbalance of interests. Reconciliation brings differences into unity and their correlation makes them unstable which creates a permanent need for reconciliation of interests. Franchise controversies concerning specific problematic inconsistencies are formed. The idea is to distinguish between primary and main franchising controversy [5, 63-74], by tracing its concrete transformations and manifestations.

Vertically are identified controversies according to the subjects of franchising, and horizontally according to the franchise process (negotiation and execution).

SUMMARY

System of franchised controversies. The main controversy in franchising is competition – the market needs of franchise and opportunities of corporations to satisfy them effectively. The main dilemma: our franchising is the most profitable - competitors franchising is the most profitable. On these grounds the main controversy is built vertically: on the one hand the requirements of the franchisee and the franchisor opportunities to satisfy them, and the other the requirements of the franchisor and the franchisee opportunities to satisfy them. The main dilemma is: taking the required obligations towards empowering franchise is profitable or it is not profitable. Whilst the subjects of the prime controversy are competitors, the subjects of the main controversy are partners. The existence of the corporation is subject to a permanent settlement of the principal controversy. Changes to it transform and express the main controversy. The main controversy is manifested by the prime one, reflecting its topicality in the aspect of developing the competitiveness of the franchise, but already between the franchise partners. Profitability of franchise partnership is influenced by the competitiveness of the franchise. The main controversy is transformed into concrete controversies arising in the sequence of the normal franchising process. The specific controversy concerns a particular market, testing the impact of the main one - the competitiveness of franchising within a particular market. At the same time, it is testing

the impact of the prime controversy - balance of interests between the franchisor and a particular subfranchisor. The specific controversies are distributed in stages of franchising - agreement and implementation. Depending on the subjects of franchising they are split into those of a higher level - between franchisor and subfranchisor, and of a lower level between subfranchisor and franchisee. The specific controversies of the higher level. Controversy regarding the scope of the right to sub-licensing. The franchise user is expected to receive the rights to sub-license on several markets, and the franchisor is not prepared to take risks by granting rights to sub-licensing on several markets and provides rights fixed for the relevant market. Dilemma: sublicense must be for several markets - sublicense is fixed for the relevant market. The subfranchisor expects a longer period for finding respective number of outlets and the franchisor sets a shorter one. Dilemma: the period for detection of objects is short – it is not. The subfranchisor expects a smaller number of outlets to be opened, and the franchisor requires a larger one. Dilemma: the number of outlets to be opened is untenable - it is not. The subfranchisor expects less stringent requirements for the business premises, while the franchisor sets them higher. The subfranchisor expects reduced insurance requirements, but the franchisor sets them higher. Dilemma: requirements are higher – they are not. Controversy regarding auditing. The subfranchisor expects more liberal rules for performing audits by the franchisor, but he sets higher auditing rights. Dilemma: audit powers are high – they are not. Controversy in technical assistance. The subfranchisor expects all staff training costs related to work according to standards to be met by the franchisor, but he only covers some of them. Dilemma: all training costs are covered by the franchisor – no, only some of the costs. The franchisor expects the equipment to conform to the set standards, but the results of the inspection show discrepancies with some standards. Dilemma: the equipment meets the standards – does not meet them. The franchisor expects the construction of premises to comply with set standards, but the results of the inspection show discrepancies with some standards. Dilemma: premises meet the standards – they do not meet the standards.

Controversy in marketing assistance:

"Marketing, viewed as the best achievement of connections and dependencies between the

overall activity of the enterprise and the opportunities of the market occupies a significant place in the activity of the individual business units" [2, 181].

The subfranchisor expects to be granted full access to all current and past promotional materials of the franchisor, but he is provided with limited access. Dilemma: access must be full – no it will be limited. The subfranchisor expects full support from the franchisor in determining his overall marketing concept and strategy but is actually provided with limited assistance. Dilemma: full explanation of the marketing concept and strategy – no, limited explanation. Controversy regarding remuneration. The subfranchisor expects a higher percentage of the franchises to be transferred by the franchisor, but the franchisor offers lower. Dilemma: the percentage is low - the percentage is high. The subfranchisor expects a longer period for implementation of certain turnover, but the franchisor suggests a shorter one. Dilemma: the period is short – the period is normal. The subfranchisor expects to provide limited access to reporting and accounting documentation to the franchisor concerning the determination of volume turnover, but the franchisor requires full access. Dilemma: provision of limited access to the accounting documentation – requirement for full access.

Sale-related controversies:

The subfranchisor expects sales realized under the brand name to be performed at a lower price, but the franchisor sets them higher. Dilemma: the criteria for determining the price are high – they are not. Controversy regarding quality control. The franchisor expects regulations and guidelines set during checks to be implemented fully by the subfranchisor, but he partially implements them. Dilemma: partially implemented - implemented entirely. Specific lower level controversies. Franchise users expect to be granted longer deadlines for the use of franchise, but the subfranchisor sets a one-year test period. Dilemma: the starting contract comes with a longer term than the trial period - the starting contract comes with a trial period. Franchising price-related controversies: it forms the income of the franchisor, but its size should be bearable for the franchisee. The dilemma is: the price of the franchise is high – it is not high. Controversies regarding the use of the brand: expectations of the subfranchisor to permanently comply with the percentage of brand presence and capabilities of the franchisee for continuous

compliance. Dilemma: percentage presence of the brand is observed – it is not observed. Controversies regarding payment of franchise fee: on the one hand the subfranchisor expects the deadline for payment of franchise fees to be observed, but on the other the franchisee does not respect the deadline. The subfranchisor expects the franchisee to pay the full amount, but he only pays part of it. Dilemmas: the deadline for payment of the franchise fee is observed – it is defaulted. Complete alignment of tax - not partially. Controversies regarding the technological standards of production and / or service: the subfranchisor sets standards for the production and / or service by requiring the franchisee to implement them unconditionally, but he does not meet the set standards. Dilemma: technological standards are met – they are not. During the renegotiation of the term for use of the brand these controversies arise: the franchisee is expected to be granted a permanent contract for the use of franchising, but the subfranchisor provides a long-term contract. Dilemma: after successful completion of the trial agreement an indefinite one may be concluded – an indefinite one cannot be signed, but a long-term.

Controversies in renegotiating the price of franchising:

"The price can be seen as a variable that provides the organization with optimum product sales, profit and market position for a longer period. The price is optimal for a certain period of time and under certain conditions of the surrounding external environment, the change of which also changes. But in any case, it must create a feeling for the consumer that he is in a favorable position "[1, 176-181].

Being an impeccable franchisee his expectations are for a percentage discount, but its size should be bearable for the subfranchisor. Dilemmas: should have a discount - no discount; percent discount is attractive - it is not attractive.

Franchising conflicts as a form of manifestation of the controversies between the franchisor and franchisee caused by different interests, goals and needs arise and are an integral part of the franchise relationship. Participation of the franchise subject in the conflict is determined by the importance of the set goals and on how emerging obstacles prevent him from realizing them. The franchising conflict is a concrete socio-economic process, and at its basis lie franchise controversies. Under the franchise conflict it is broadly understood a

collision which occurs where the conduct of the franchisor or the franchisee blocks the behavior of the franchisor or franchisee in relation to franchising. Upon passage of the franchise controversy from one degree to another degree arises precisely the franchising conflict. The degrees of franchise conflict are graded as follows [4, 25]: diversity, polarization, confrontation, antagonism. Antagonism and conflict are not the same. Antagonism disappears, but franchise controversy remains. During a franchise controversy both of its interrelated and mutually exclusive inherent countries - the unity of opposite franchise opposites and the struggle between franchise opposites are in relative equilibrium. This is the fundamental difference between conflict franchise and franchise controversy. The unity of franchise opposites and the struggle of opposites in franchise odds are (relatively) in balance, whilst during franchise conflict the struggle of opposites dominates over the unity of franchise opposites. Based on the presented system of franchising controversies can also be differentiated relevant conflicts. Imbalance of any concerted conflict brings it into degrees of conflict. The actual imbalance has undetermined character. The idea is to use the event as an indication of the need for its resolution. In resolving franchising conflicts our proposal is to approach them in terms of the constructive [4, 19] functions of the conflict – its regulating and transformative ones. The momentary stage of the conflict and the possibilities for dealing with it are considered [4, 24-25].

CONCLUSION

The franchising conflict is natural and part of the everyday. It stays at the heart of the development of franchising relationships. As a type of interagency conflict, it is a complex economic phenomenon where many different influences, relationships and links intertwine. It has characteristic causality and dynamics of flow and finish. It is manageable, but there are not ready recipes for its resolution. Conflictology provides fundamental principles related to the conflict's structure, dynamics and influence. Taking advantage of franchise conflict is a complicated art in modern conditions of uncertainty and risk. The ability to capture the structural aspects of pre-conflict franchise situations, becomes is a key conflictological competence, enabling heuristic information to be

obtained about any problems that are encountered.

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**STUDY OF STUDENTS' ENTREPRENEURSHIP INTENTIONS
FROM THE BUSINESS MAJORS
AT UNIVERSITY „PROF. AS. ZLATAROV“ – BURGAS ACROSS GENDER**

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ABSTRACT: *The aim of this article is to present the result of questionnaire survey of entrepreneurial intentions and activities of students of business studies at Prof. As. Zlatarov University – Burgas. The data are compared to gender to establish the attitude of male and female students towards entrepreneurship and to track differences between genders. In addition, it is possible to trace how the major and the specificity of the studied disciplines influence the formation of entrepreneurial attitudes in the students from both gender.*

Key words: *entrepreneurship, entrepreneurship intentions, entrepreneurship across gender*

Introduction

The research field of entrepreneurship is getting more and more important in Bulgaria. The Global Entrepreneurship Monitor (GEM) Bulgaria and this study were carried out to gain more insights about entrepreneurial intentions and activities in Bulgaria. Most of the research questions in this study are based on the Global University Entrepreneurial Spirit Students' Survey (GUESSS). The origins of GUESSS go back to 2003 when researchers at the University of St. Gallen designed the first GUESSS questionnaire. The survey is conducted every second year with the purpose to grasp the entrepreneurial intent and activity of students.

This article presents the results of a survey carried out among students of business studies at „Prof. As. Zlatarov“ University-Burgas.

The objective of the study is to explore the entrepreneurial intentions and activities of students of business studies at Prof. As. Zlatarov University – Burgas across gender,

The aim of this study can be summarized as systematic observation of entrepreneurial intentions and activities of students across gender.

The study is theoretically based on the Theory of Planned Behaviour (TPB) (Ajzen, 1991, 2002; Fischbein and Ajzen, 1975). Its underlying argument is that the intention to perform a specific behavior is influenced by three main factors: attitude toward the behavior, subjective norms, and perceived behavioral control. The survey is focused on career choice intentions in general and entrepreneurial intentions in particular as the

specific behavior to (intentionally) be performed. In addition, factors that may affect the evolution of carrier choice or entrepreneurial intentions through the three main elements of the TPB are investigated: the university context, the family context, personal motives, and the social/cultural context

Research design and methodology

At “Prof. As. Zlatarov” University, approximately 1 000 questionnaires were sent out to all students from undergraduate business study programs (bachelor). With 209 fully completed questionnaires, the response rate amounts 20,9 %.

Undergraduate business study programs at the university include four majors - management, industrial management, marketing and tourism. Over 1200 students are educated in these programs.

The sample consists of more female (66%) than male (34 %) students (Figure 1). This distribution is similar to the overall international GUESSS sample but the share of female students varies significantly across the participating countries (Sieger et al., 2014).

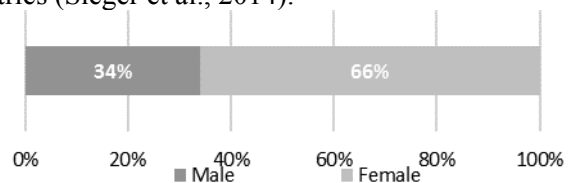


Figure 1. Gender distribution of the sample

Looking at students' gender across business study majors illustrated in figure 2 female students dominate all four study major groups. In major Tourism there is a more or less even distribution between female (54,7% and male students (45,3%). More female students (61,7 %) are enrolled in Marketing major and even more in major Industrial management (72,7 %). Most female respondents are from the mayor management (80 %)

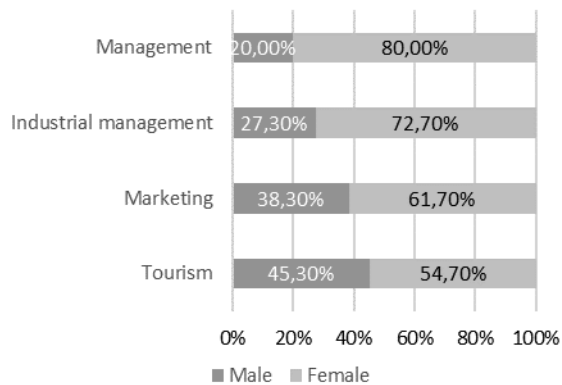


Figure 2. Students' gender across business study majors

Students were also asked to rate their average study performance on a 7-point Likert scale from 1 (far below average) to 7 (far above average). As figure 3 shows, 6,3% of the students see their study performance below average. Every fifth student (21,1%) sees him- or herself as performing "Rather above average". More than half of the respondents (53,6%) rate their performance as at least "Pretty above average". Looking at differences between gender, 79,6% of the female students rate their study performance above average whereas 59,2% of the male students ate their study performance above average.

Career choice intentions across gender

The interest in gender perspectives of entrepreneurship has increased. International studies have found a consistent pattern that a larger share of males are engaged in entrepreneurship compared to females (measured as intention to start a new business) (Amoros, Bosma, 2014). Bulgarian Global Entrepreneurship Monitor (Andonova, 2017) have found that in Bulgaria, there is no evidence for a gender gap regarding entrepreneurship. We also investigate how gender might differ in career choices and entrepreneurial intentions.

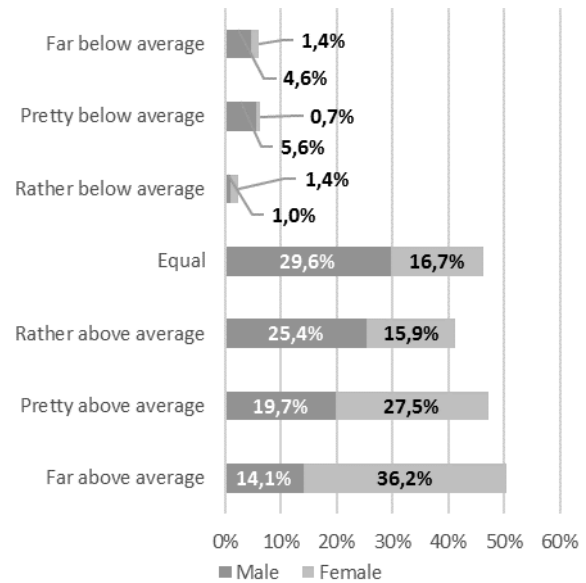


Figure 3. Study performance across students' gender

Figure 4 shows the distribution of career choice intentions right after studying by gender. The majority of both male (66,20%) and female students (80,43 %) intend to start as employees in a private or public organization. The share of intentional founders among males is slightly higher than among females (11,27% versus 8,70%). Successor as a career path, whether the firm is owned by one's parents or not, is not attractive for female students (2,90%), while for male students it is more attractive (8,45%).

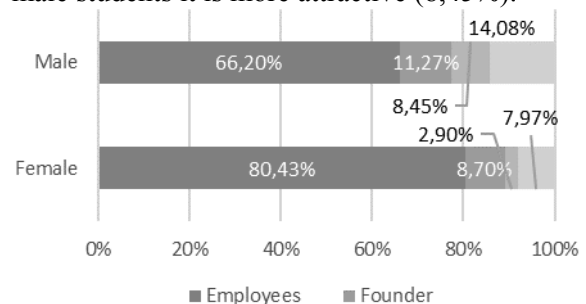


Figure 4. Career choice intentions by gender right after studies

After five years, the career intentions for both genders change (Figure 5). The share of male and female students who intend to become an employee five years after their graduation is lower for both male (26,76%) and female (41,30%) students, while the intention to found one's own firm becomes more important. The main difference is that a larger share of male students (36,62%) wants to become a founder of a firm compared to a share of 32,61% of female students. Also more students want to be a suc-

cessor in their parent's or another firm after five years with an equal share among male (23,94%) and female (16,67%) students.

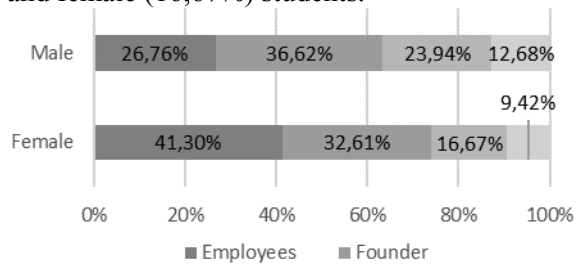


Figure 5. Career choice intentions by gender five years after studies

Primary determinants of entrepreneurship intentions

1. The general level of entrepreneurship intentions across majors and gender

The career intention to become an entrepreneur depends on several factors. To examine the relationship between different factors the study surveys students' entrepreneurial intentions using a scale of six items. Students are asked to indicate their level of agreement to these statements that capture their general intention to become an entrepreneur in the future (Linan, Chen, 2009). The answers of the six statements were anchored from 1 (strongly disagree) to 7 (strongly agree).

The entrepreneurial intention scale is generated by calculating the mean of all six answers. The result for our study shows that on average the entrepreneurial intention among Bulgarian students is above the average in comparison to the international GUESSS dataset - mean=3,70 (Sieger et al., 2014).

An analysis based on the majors of business study (Figure 6) presents that the average entrepreneurial intention is highest for students in majors Management (4,97; n=30) and Marketing (4,97; n=60), followed by Industrial Management (4,73; n=66). The lowest entrepreneurial intention can be found among Tourism students (4,62; n=53).

A test for gender differences reveals a lower mean value for female students compared to male students across all business study majors. Between the different majors of study, the level of entrepreneurial intention is continuous lower for female students than for male students. The biggest difference between female and male students can be found among Marketing students (4,57 versus 5,61). However, the general picture is nevertheless that the entrepreneurial intentions are slightly higher compared to the international

sample for both male and female students. For gender differences is confirmed by the international GUESSS survey that the aggregated entrepreneurial intention measure exhibits lower average values for female students compared to male students (3,5 compared to 4,0) (Sieger et al., 2014).



Figure 6. Level of entrepreneurial intentions across business study majors and gender

2. The university context

2.1. Attendance of entrepreneurship courses across gender

In this study, it is important to investigate the role of the university as a context for entrepreneurial intentions. How universities affect entrepreneurial intentions has been a subject of interest for other researchers (Lima, Lopes, Nassif, da Silva, 2014).

Students were asked to what extent they have been attending entrepreneurship-related courses and offerings at their university. Figure 7 shows that less than half of the students in the sample (47,4%) have attended at least one entrepreneurship course as compulsory part of their studies. The gender breakdown is 36.6% for male and respectively 52.9% for female. Only 11% of the students study a specific program on entrepreneurship. About 15% of them are male and only 8,7% are female. Near 24% of male and 20,3% of female respondents have not attended a course on entrepreneurship (21,5% in total). Furthermore 20,1% have attended at least an elective entrepreneurship course. Male are nearly 6% more than female who have responded on this question (23,9% for male and 18,1% for female).

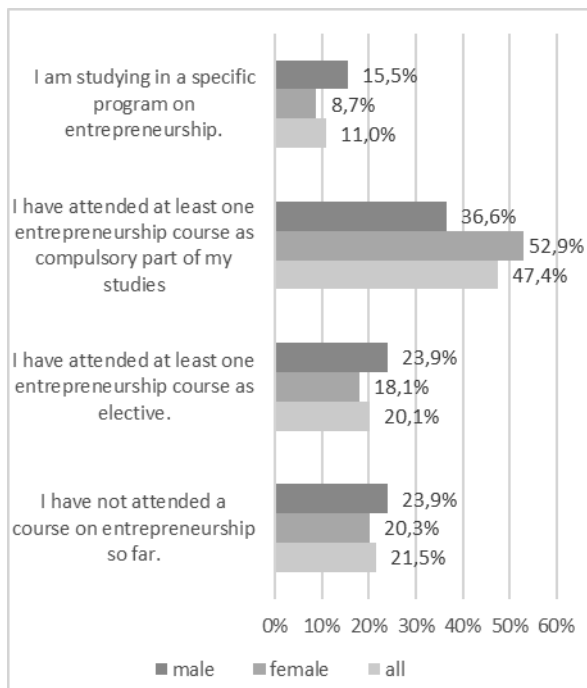


Figure 7. Attendance of entrepreneurship courses across gender

2.2. Level of entrepreneurial climate at the university

Students were also asked about the entrepreneurial climate at their university by indicating the extent to which they agree to three statements (Luethje, Franke 2004). The answers for the entrepreneurial climate were anchored from 1 (strongly disagree) to 7 (strongly agree).

The entrepreneurial climate scale is generated by calculating the mean of all three answers. On average the entrepreneurial climate at Prof. As. Zlatarov University-Burgas is relatively low (mean=3,78; n=209). The global average is 4,0, which constitutes the middle of our scale. Almost 30% of all students show a level of agreement of 3 or lower. Almost half of all students assess the entrepreneurial climate at their university as being between 3 and 5 (Sieger et al., 2014). This indicates room for improvements. Figure 8 shows the calculated mean for the entrepreneurial climate scale across majors of study and by gender.

The average entrepreneurial climate is rated highest by Industrial management students (4,11; n=66). The other business study majors do not differ very much. Management (3,93; n=30), Marketing (3,73; n=60) and Tourism (3,35; n=53) have similar average entrepreneurial climates.

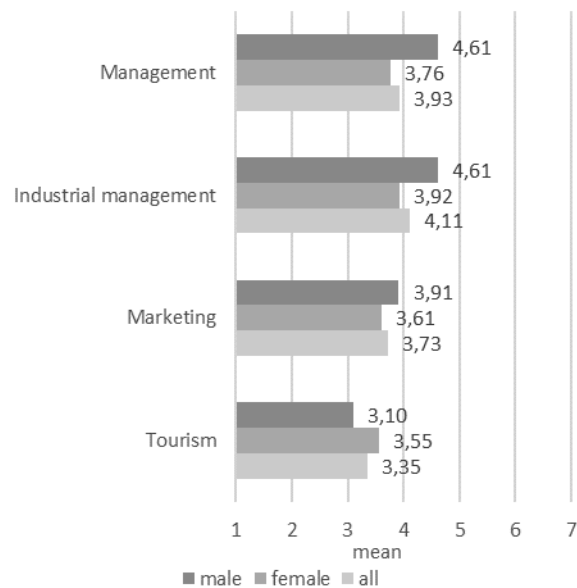


Figure 8. Level of entrepreneurial climate across business study majors and gender

2.3. Overall assessment of entrepreneurial learning strength at the university

Our survey includes an additional question about overall students' assessment of entrepreneurial learning strength at the university. The students were asked to indicate the extent to which they agree to a statement about their overall entrepreneurial learning process and outcome. The statement indicates to what extent students think that the all attended courses would increase their understanding of entrepreneurial issues. The answers for the entrepreneurial learning statement were anchored from 1 (strongly disagree) to 7 (strongly agree).

Overall entrepreneurial learning at Prof. As. Zlatarov University is perceived as relatively good (mean=4,56; n=209). This assessment looks similar as with the detailed assessment of entrepreneurial learning strength (mean=4,54).

Figure 9 shows the calculated mean for entrepreneurial learning across majors of business study and by gender. The entrepreneurial learning is perceived highest among Industrial Management students (4,74; n=66). The other majors of business study do not differ very much. Entrepreneurial learning among Marketing students is on average 4,63 (n=60) and among Management students 4,50 (n=30). The average entrepreneurial learning is perceived lowest among Tourism students (4,28; n=53).

Gender differences are also not very large. The mean values for male students compared to female students are slightly higher (4,66 versus 4,52). Between the different majors of business

study, the level of entrepreneurial learning is rated differently among Management students. Management female students perceive the entrepreneurial learning weaker (4,42) than male students (4,83). There is also a similar gender gap in Industrial Management students: male 4,94 and female 4,67. For the major Marketing the male students rating is lower than female (4,73 versus 4,48). Among Tourism students, gender differences are the same as in major Marketing. Male students perceive the entrepreneurial learning on average at 4,42. The female Tourism students rate is marginally lower (4,17).

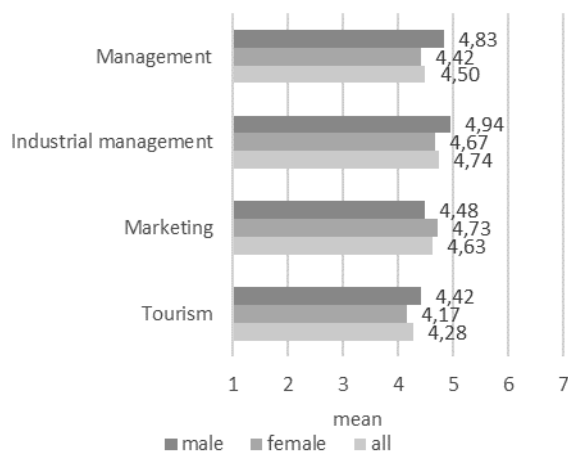


Figure 9. Overall assessment of entrepreneurial learning level across business study majors and gender

3. The family context. Students with self-employed parents across gender

The family background also plays an important role for students' career choice. We know from literature that a higher proportion of students from families with self-employed parents choose to become entrepreneurs (Laspita, Breugst, Heblich, Patzelt, 2012). Therefore students were asked if their parents (father, mother or both) are currently self-employed.

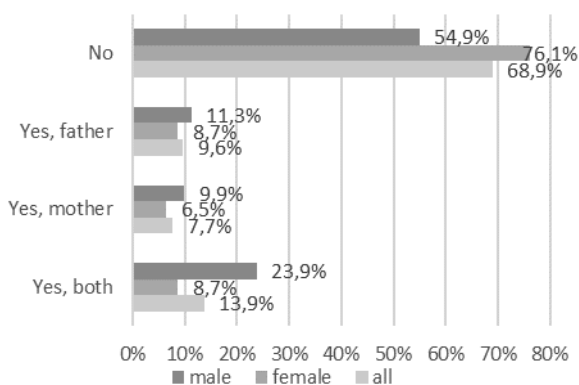


Figure 10. Students with self-employed parents across gender

Figure 10 shows the percentage of students with self-employed parents. 68,9% of all students have no self-employed parents. 54,9% of them are male and 76,1% are female. About 31% of the students have a father, mother or both parents who are self-employed. In detail, 13,9% of all respondents report that both parents are self-employed (23,9% of them are male and only 8,7% are female), 7,7% has a self-employed mother and 9,6% a self-employed father. Male were mostly responding affirmatively to all three possible answers (mother, father or both).

4. Personal motives across gender

Based on the TPB researchers have found a positive correlation between high intentions (motives) for achieving something and a person's behavior (Laspita et al., 2012; Zellweger, Sieger, Halter, 2011). Hence, career motives are also an important determinant of career choice intentions. Students were asked to rate the importance of ten different motives when they decide about their future career path. The answers were anchored from 1 (not important at all) to 7 (very important).

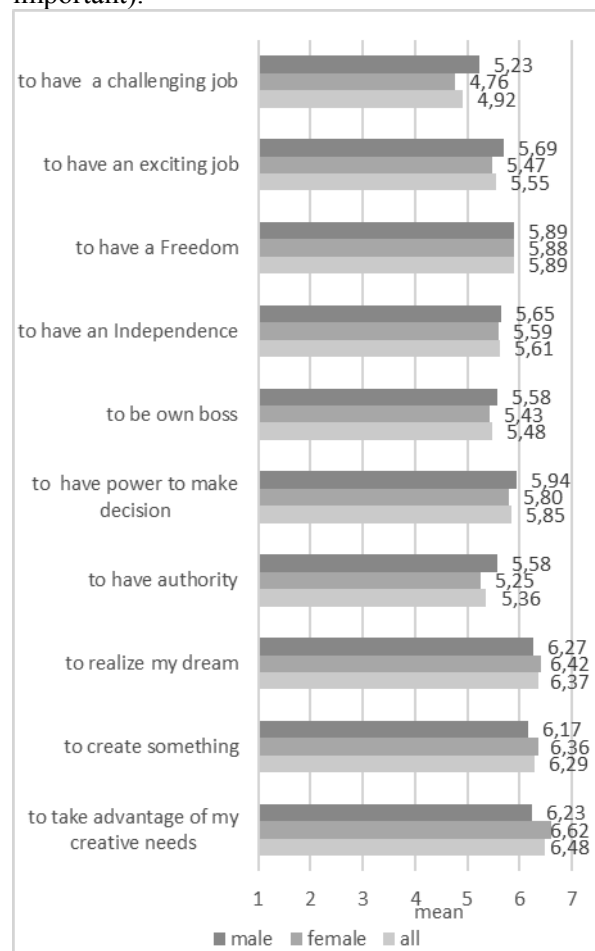


Figure 11. Importance of different career motives across gender

Figure 11 shows the average importance (means) of the ten career motives among Bulgarian students. Their most important career motive is “to take advantage of my creative needs” (6,48). The gender distribution of mean is as follows – 6,23 for male and 6,62 for female. Next most important motive is “to realize my dream” (6,37) with almost identical results for men and women. Third career motive is “to create something” (6,29) with 6,17 points for male and 6,36 – for female. The least important motive is “to have a challenging job” (4,92) – 5,23 for male and 4,76 points for female. Also less important, but still rated as rather important is “to have authority” (5,36). Closer to the average mean are female with 5,25 points than male – with 5,58 points.

5. Social and cultural context

5.1. Reaction of people from the close environment across gender

Researchers argue that people in their network have a positive effect on becoming a founder of a firm (Souitaris et al., 2007; Zellweger et al., 2011) while the negative effect of networks on entrepreneurial activities is less investigated and understood. Based on the TPB we investigate the subjective norm or social pressure that is carried out by close peers. The more positive the expected reaction is from those peers, the more likely it is to behave as intended. Students were therefore asked how positive or negative different close people would react if they would pursue a career as an entrepreneur. The students should rate the reaction for three groups of people: close family, friends and fellow students (Linan, Chen, 2009). The answers were anchored from 1 (very negatively) to 7 (very positively). The subjective norm scale is generated by calculating the mean of all three answers.

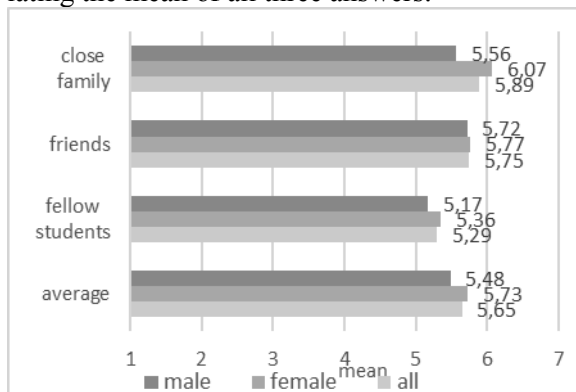


Figure 12. Reaction of people from the close environment across gender

On average the subjective norm among Bulgarian students is relatively high (mean=5,65, n=209), which is slightly above the global average of 5,3 (Sieger et al., 2014). The results for the "close family" among students of the University "Prof. Dr. Assen Zlatarov" - Burgas are as follows: for male, the average grade is 5,56 whereas for female it is 6,07 and the average mean score is 5,89 points. Almost the same is the average mean among "friends", with the difference between female and male being only 0,05 (5,72 for male and 5,77 for female). The average rating for "fellow students" is 5,17 points for male and 5,73 points for female.

5.2. Assessment of perceived risk to start an own business across gender

Another social and cultural key factor of entrepreneurship is risk. Therefore, our study investigates to what extent the students assess it as risky in becoming an entrepreneur. Students were asked to indicate their level of agreement to three statements - I consider starting up my own business to be very risky., I think it is dangerous to manage your own business, I believe that business ownership has high risk (Pennings, Wansink, 2004). The answers were anchored from 1 (strongly disagree) to 7 (strongly agree).



Figure 13. Assessment of perceived risk to start an own business across gender

On average the perceived risk to start an own business among students from Burgas University “Prof. As. Zlatarov” is very weak (mean=4,33; n=209) – figure 12. This rating is among the five GUESSS countries with the weakest risk perception with Mexico (4,09), Brazil (4,31), Romania (4,36) and Estonia (4,37) (Sieger et al., 2014). The risk of "manage your own business" is considered the least risky with a 3,86 average score

(3,96 for male and 3,86 for female). Almost equally risky, according to male and female, is to "own my own business might be very risky". According to respondents, the biggest weigh is the claim that "business ownership has high risk" - 4,65 points.

Secondary determinants of entrepreneurial intentions

1. Attitude towards entrepreneurship across gender

According to the theoretical model of the research (Figure1), the attitude towards behavior (Linan, Chen, 2009) is among the major factors that may influence the formation of entrepreneurial intentions of university students and strengthen their "entrepreneurial spirit".

Attitude toward entrepreneurship is constructed from five items, including whether becoming an entrepreneur is seen as having significant merits or demerits for the students themselves; whether becoming an entrepreneur is an attractive prospect; and whether, given the opportunity and the capital, the student will likely become an entrepreneur (Linan, Chen 2009).

Students are asked to indicate their level of agreement to five statements that capture their general attitude toward entrepreneurship (Linan, Chen, 2009). Their answers were anchored from 1 (strongly disagree) to 7 (strongly agree). The attitude toward entrepreneurship scale is generated by calculating the average of all five answers

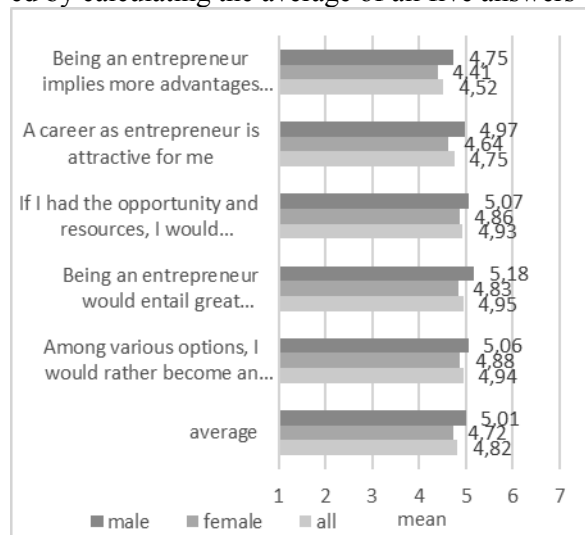


Figure 14. Attitude towards entrepreneurship across gender

Figure 14 shows that among Bulgarian students positive attitude towards entrepreneurship is strongly expressed in general. Note that many

of the respondents largely agree that they do not have enough resources in order to realize their entrepreneurial potential.

The result for our study shows that on average the attitude toward entrepreneurship among Bulgarian students (4,82) is slightly above the average in comparison to the international GUESSS dataset (4,72). The gender breakdown is as follows: The average mean for this indicator to male is 5,01 points, which is more than the average of the GUESSS surveys, while the average female's assessment is equal to the GUESSS.

2. Locus of Control across gender

Internal locus of control describes the tendency of individuals to believe that they control the events in their lives, rather than attribute them to external circumstances.

The questionnaire asked students whether they agree with three statements that capture the students' general perception of how they assess their ability to take control over the situation. Their answers were anchored from 1 (strongly disagree) to 7 (strongly agree). The internal locus of control scale is generated by calculating the average of all three answers. Figure 15 shows the distribution of the mean values of the responses to each statement and their average among gender of Bulgarian students.

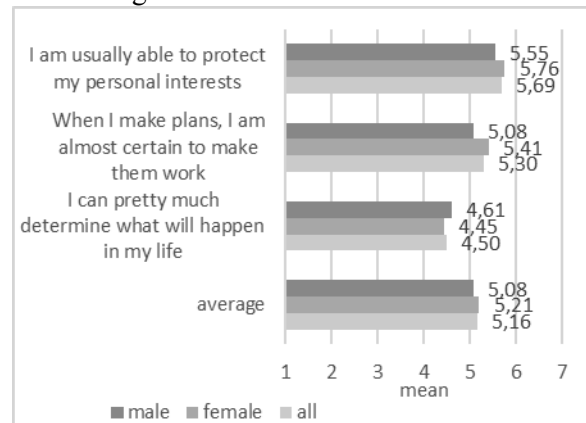


Figure 15. Internal locus of control across gender

The average values of all three answers show that female have slightly bigger locus of control than male (5,21 versus 5,08).

3. Entrepreneurial Self-efficacy across gender

The formation of entrepreneurial intentions is largely determined by presence of specific competencies required for the creation and running a business. Entrepreneurial self-efficacy describes

perceptions of individuals about their abilities to carry out the entrepreneurial tasks and achieve the desired results. When planning their career, students evaluate and relate their skills to the requirements of various professions. Thus, high level of self-efficacy in relation to the tasks important for the entrepreneurs may increase the chances of selecting an entrepreneurial career by students (Boyd, B. et al., 2015).

To measure the level of entrepreneurial self-efficacy, students were asked to indicate their level of competence in performing seven tasks. Their answers were anchored from 1 (very low competence) to 7 (very high competence).



Figure 16. Distribution of the aggregated index of the entrepreneurial self-efficacy across gender

Figure 16 shows the distribution of the mean level of competences among Bulgarian students in accordance with their career choice intentions as well as the distribution of the aggregated index of the entrepreneurial self-efficacy across gender. Based on the responses for each task, an aggregated index of the entrepreneurial self-efficacy for all business students sample was calculated.

Data analysis showed that for Bulgarian students the overall level of entrepreneurial self-efficacy (4.89) is slightly higher than in the international sample (4.62). Although the results are slightly above the average of the global sample, they also show that there is a need to develop entrepreneurial competences and skills that

can be largely achieved through entrepreneurial education.

It is noteworthy that with all elements of self-efficacy the average score is higher by male than female. In addition, the average estimate of all elements of self-efficacy is higher than the international average. Only "identifying new business opportunities" has a lower than average score (4,43 points). The gender breakdown of the average score for all indicators is: 5,02 for male and 4,83 for female.

Conclusion

The sample of conducted survey is based on students from the different majors in Business studies at Prof. As. Zlatarov University – Burgas, Bulgaria. About 1 000 students were asked of whom 209 finished the questionnaire resulting in a response rate of 20,9 per cent.

In the following, we will highlight the main results:

- the sample consists of more female (66%) than male (34 %) students;
- 79,6% of the female students rate their study performance above average whereas 59,2% of the male students rate it above average;
- the majority of both male (66,20%) and female students (80,43 %) intend to start as employees in a private or public organization;
- the share of students who intend to become an employee five years after their graduation is lower for both male (26,76%) and female (41,30%) students;
- the average entrepreneurial intention is highest for students in majors Management (4,97; n=30) and Marketing (4,97; n=60);
- less than half of the students in the sample (47,4%) have attended at least one entrepreneurship course as compulsory part of their studies;
- on average the entrepreneurial climate at Prof. As. Zlatarov University-Burgas is relatively low and overall entrepreneurial learning is perceived as relatively good;
- 68,9% of all students have no self-employed parents;
- most important career motive among Bulgarian students is "to take advantage of my creative needs" (6,48);
- the subjective norm among Bulgarian students is relatively high (mean=5,65, n=209);
- the perceived risk to start an own business among students is very weak mean=4,33;
- average the attitude toward entrepreneurship among Bulgarian students is 4,82;

- the average values of locus of control shows that female have slightly bigger than male (5,21 versus 5,08);
- the overall level of entrepreneurial self-efficacy is 4,89.

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THEORETICAL RESEARCH ON THE OUTSOURCING OF SMALL AND MEDIUM-SIZED ENTERPRISES

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ABSTRACT: *The social and economic impact of SMEs is significant due to their huge relative share among business organizations, the jobs they provide and their contribution to the economy. Although SMEs are a common object of research their logistics remain outside managers and researchers' interest. SMEs are heavily vulnerable to the factors surrounding their environment and to the dynamic global and local conditions. Therefore the successful achievement of the management goals poses many challenges to company leaders. In order to realize their objectives business executives need to cover a wide range of activities in compliance to the process approach and implementing managerial functions in areas that are often considered insignificant being underestimated or ignored. Considering the limited balance sheet value of SMEs and their restricted capacity and budget it gets clear that SMEs' spending items are highly sensitive. In order to achieve economic efficiency in desired rates, and often just for market survival, managers should strictly monitor any fluctuation and adequately use the competitive market opportunities to get optimal results based on informed decisions. The present work aims at attempting to provide a theoretical overview of the achievements of science in the field of SME logistics activities, to explore the importance of logistics for the success of small and medium business units, to find out decision makers for and against logistics outsourcing in SMEs and determine whether logistics is a key competence in present day business world.*

Key words: *logistics, outsourcing, SMEs, logistics management, transaction costs*

INTRODUCTION

Based on EUROSTAT in 2015 99.8% of all 23.501 billion enterprises functioning on the territory of The European Union (EU) are small and medium-sized (SMEs). 66.3% of EU labour population outnumbering 137.445 billion people are employed by SMEs. Same year SMEs in Bulgaria had even more important impact as 99.8% of all 326 K business units are SMEs where 74.8% of employed earn living raising up 65% added value (European Commission 2015).

SMEs are typical example for economic importance, flexibility, ability for fast innovation and implementation of management decisions. Therefore SMEs have been researched a lot. However this is not valid for their logistics which have been studied occasionally. Logistics expert share some common hypothesis on SMEs as:

Hypothesis 1 (H1): "Most SMEs are not interested in logistics as a management field neither in strategic nor in operational matter. They call this good practice. However that is bad practice (La Londe quoted by Harrington 1995, 55).

Hypothesis 2 (H2): "SMEs often consider logistics as a matter with secondary importance in their business. Transportation, storage and distri-

bution of sources are just something they cannot avoid." (Kummer 1995, 10).

Classification criteria for size of an enterprise are varied but not limited to headcount, sales revenue, capitalization, investments, turnover, etc. European Union applies SMEs definition as per European Commission Recommendation № 1422/2003 (see Table 1).

European Association of Logistics provides the following definition for logistics: "Set of activities for organizing, planning, controlling and realizing the product stream from the moment the product is developed and purchasing the necessary materials through the production and distribution to the customer in order to satisfy the market requirements through minimal costs and minimal amount of the invested capital".

In 2006 Vizhanyo did research on logistics of SMEs. 90 % of studied enterprises considered logistics as activity consisting only of transportation and storage. Meantime 55 % of them claimed that logistics process starts at their supplies to storage and ends up at distribution of goods to customers. (Vizhanyo 2006). According to another research carried by Quayle in 2002 65

% of 232 examined SMEs did not consider supplies as essential in their business. What is more they claimed that supplies had no influence in their performance. (Quayle 2000).

Table 1: Classification criteria for SMEs in EU.

	Head-count	Annual Net Sales Revenue	Balance Value
Micro Enterprises	less 10 employees	max 2 billion EUR	max 2 billion EUR
Small Enterprises	10-49 employees	max 10 billion EUR	max 10 billion EUR
Medium-sized enterprises	50-249 employees	max 50 billion EUR	max 43 billion EUR

In 1995 Kummer did one of first researches in the field. He examined German enterprises with headcount of less 200 employees. Kummer focused on coordination between the different units of the logistics chain and the link between material and information flows in the logistics system. He found out that latter is not considered important and therefore no systematic logistics management is applied (Kummer 1995). There is no unified definition of outsourcing in the scientific literature: in the narrow sense, it is "third party appointment for established tasks, functions previously performed within the company or institution or related instruments, equipment and capacity" (Szabó 1998, 138). Many authors apply alternative names for Logistics Outsourcing, i.e. Ivanaj and Masson Franzil [2006] and Selviaridis and Spring [2007] call it third-party logistics (3PL), contractual logistics, logistics union and logistics subcontracting. Dimitrova and Dimitrov [2017] wrote that outsourcing is an approach with parallel impact on the flexibility and competitiveness of the organization. Most articles for logistics outsourcing do not examine its theoretical context (Selviaridis and Spring 2007). 69% of 114 articles on logistics outsourcing examined by Selviaridis and Spring represent trends in varied industries without giving references to specific scientific text. Rest explain logistics outsourcing based on theories for transaction costs and key (core, leading) competences. Sometimes other theories are applied such as Game Theory (Ivanaj and Masson Franzil 2006).

The subject of this paper is the issue of the achievements of science in the field of outsourcing of logistics activities to SMEs and the aim is

to attempt to summarize the theoretical research in the scientific and research literature on the issue. Tasks have been set to study the impact of transaction costs on logistics outsourcing, to determine the impact of the strategy on leading competencies on SME logistics outsourcing, and to explore the scope of outsourcing as an element of research.

Influence of transaction cost theory on the outsourcing of logistics activities of SMEs

Transaction costs theory is based on Coase [1937] and developed by Williamson [1975]. This theory is one of modern institutional and economic trends based on the synthesis of neoclassical macroeconomics and organizational theory. Transaction economy states that participants in the process have a limited sense of rationality, they are opportunists and risk-neutral. The costs of transferring ownership of the good or service (transaction) arise during the process and organization of the process (e.g. costs of acquiring information, type of contractual relationship, degree of control, interpretation of the agreement between the parties, in its parameters). These costs, as well as production costs, depend on the investments needed to carry out the specific activity, the degree of uncertainty of the environment and the frequency of the activities carried out. These three parameters form the factors on which the decision to take outsourcing relationships depends. Table 2 presents the influence of factors on cost types.

In the research literature, the concept of transaction costs is imposed, and Dimitrova and Dimitrov [2017] explain the necessity of their analysis in the following way: "Each elementary logistic process serves as a purposeful transformation of the state of the logistic object. The degree of logistics outsourcing indicates how many of the elementary logistics processes in the logistics chain are being implemented by external organizations.

Table 2: Comparative characteristics of the impact of production (transformation) costs and outsourcing (transaction) costs as a result of the factors that determine their levels.

	Investments on logistics activities	Indetermination in the field	Frequency of logistics activities
Transformation costs	Decrease	Unchanged	Decrease
Transaction costs	Increase	Increase	Decrease

Source: (Kieser 1995, 289)

Determining an optimal degree of logistics outsourcing for an enterprise across the supply chain requires assessing how much of the logistical transformation is cost-effective to perform independently and what through external organizations. Dimitrov [2017] considers the optimal division of activities between the participants in the value chain as the main problem of modern logistics, and the goal is to reduce logistics costs, improve the quality of services provided and increase the reliability of the logistics process. Solving this problem requires clarifying the following two main issues. The first is measuring the degree of outsourcing of an enterprise's logistics activities, and the second is determining if current level is optimal or whether it should increase or decrease (Dimitrov 2017). According to Maltz and Ellram, 1997 outsourcing is modification of classic setting for choosing the Make or Buy decision. Transaction costs theory explains decision taking to produce or to buy as follows:

- First, if logistics require specific and extraordinary investments and lead to uncertainty, it is better for the enterprise to outsource them.

- Second, the more difficult the access to logistics purchases and sales and the higher the possible profits, the more attractive is their self-implementation within the organization.

Few have studied the relationship between logistics outsourcing and transaction cost theory, and their implementation within the organization itself is more attractive. Ivanaj and Masson Franzil [2006] find that logistics sometimes requires specific transaction-specific investments (eg cold stores, special trucks). Although the level of these investments is decreasing with increasing volumes and turning logistics into organization-standard activities, even the most popular among them, such as transport (Kotabe and Mol 2009) and storage (Skjøtt-Larsen 2000) , can only be subcontracted in the medium term. It is considered that the need for business-specific assets and the difficulty in taking into account the performance of third party operations on customer satisfaction are favorable conditions for deciding on the self-fulfilment of logistics activities (Aertsen, 1993). Typical for SMEs is the low degree of outsourcing. The main reason for this is need for considerable levels of their relative transaction costs for logistics services leading to loss of balance in expenditure items in company ledger. Researchers like Kállay and Imreh [2004], and later Van den Berg [2009], reach the same conclusion. They say that the traditional outsourcing model was designed for large vol-

umes to achieve economies of scale, although with the development of forwarding companies globally, the logistics activities' attractiveness is becoming applicable to SMEs as well.

IMPACT OF STRATEGIES ON KEY COMPETENCIES ON SME OUTSOURCING

According to Hamel and Prahalad [1990], the key competences underlying resource theory make it possible for the company to enter and retain multiple market segments. Competencies, which are valuable, scarce, difficult to copy, and give the appearance of the organization itself, are built through multiple resources and consist of subcompetences characterized by complexity. In the scientific literature, it is not clear whether logistics is a core competence (main activity) and the conclusions are contradictory. For example, Sheffi [1990] considers logistics to be only part of the corporate key competencies. Halley and Guilhon [1997] are of the opinion that logistics is a core competence only for small enterprises in agriculture and the agro-food industry, i.e. when there is a need for rapid commodity turnover and liquidity of production. Olavarieta and Ellinger [1997], relying on a resource-based strategy, find that logistics competencies can be difficult to copy, they are valuable and difficult to access, therefore they are the core competencies that are fundamental to the business unit. Fine and Whitney [1996] believe that even the management of outsourcing processes is a core competence in itself. The most common advantage of logistics outsourcing is the reduction of logistics costs for the company (Bardi, Tracey 1991, 15-21). Lower logistics costs can also be achieved through economies of scale and scope resulting from the larger volumes of similar or identical logistics services that the logistics provider also performs through greater use of specialized assets. In addition, logistics service providers can balance the different demand-side logistics services better than a single production organization by diversifying their customers. They can also reduce labor costs by taking advantage of lower pay levels than those in manufacturing industries (Dimitrova 2018). A study by Bentzen et al. [2000] confirms that medium-sized enterprises do not consider service activities such as transport, storage, stock management as their basic skills. Logistics outsourcing studies usually offer little general conclusions such as:

- logistics outsourcing as a phenomenon is constantly increasing over time, and this trend is

due to the development of globalization and technology.

- logistics outsourcing is more common in developed countries than in emerging economies (eg Pezzotta et al. 2006).

Scope of areas of study of the outsourcing of logistics activities in SMEs

SME logistics outsourcing studies are usually based on surveys comparing outsourcing practices in small business to large companies. According to a study by Evans et al. [1990] small business units focus on the image and experience of the carrier. They see as their supplier the one who offers optimum order picking time, transit time, minimum damage and damage during transportation, number of service points and accessibility. Murphy et al. [1995] examined 76 US companies dealing with international trade. Their results and received values are shown in Table 3. One can say that small business is not significantly different from large companies. However it must be taken into consideration that only companies that control their logistics activities are included in the sample.

Murphy et al. [1999] study the choice of a service provider at 116 small and large companies in Northeast Ohio and comes to the following conclusions:

- First, there are significant differences between small and large businesses in choosing a mode of transport depending on whether the shipments are inbound or outbound.

- Second, large companies use almost twice as much logistical intermediaries, and in this respect they differ greatly from small firms.

Table 3: Logistics practice of SMEs and large companies engaged in international business.

	SMEs	Large companies
International shipping	28,4 %	18,0 %
Use of marine transport	55,3 %	66.7 %
Use of air transport	15,6 %	25.9 %
Use of international carriers	66,9 %	70.1 %
Number of logistics activities within the organization	4.2	5.1

Source: (Murphy et al. 1995, 11)

In addition to the logistics outsourcing practice of large companies and SMEs, research tries to measure the extent and causes of outsourcing involving both customers and service providers. McIvor [2000] develops an outsourcing assessment framework, comprising four stages:

Stage 1: Determination of basic and auxiliary business activities. Unless justified by strategic considerations, auxiliary are outsourced.

Stage 2: Assessment of relevant activities along the value chain.

Stage 3: Analyzing the total cost of core competencies where the lack of suppliers or the higher competence of the company leads to its own presentation (preservation or development).

Stage 4: Analyzing the business unit-provider relationship. Where there is a sufficient number of suitable subcontractors or those that involve a high level of security, this favors the development of strategic outsourcing of activities. Conversely, with an insufficient number of suitable suppliers and a low level of competition in the realm, then you are betting on the development of your own logistic.

A major drawback of McIvor's model is the assumption that only the scenarios mentioned are possible and excludes options where, for example, no supplier who is capable of serving the core competency poses a threat or risk.

There is a rich theoretical database of reasons for choosing options and for the advantages and disadvantages of logistics outsourcing but it is based almost exclusively on research for large enterprises. For example, Selviaridis and Spring [2007] subdivides the reasons for choosing logistics outsourcing into three categories: those related to the company's strategy, its finances and its operations.

1. Strategic benefits usually include core competencies and focus on external expertise. Disadvantages are based on loss of logistical competence and loss of control and customer contact.

2. The financial advantages are the possibility to modify the level of fixed costs as part of them become variables and company benefits of economies of scale.

3. The main operational advantages are the reduction of inventory levels, the shortening of the logistics cycle and the implementation time, but significant shortcomings are the insufficient expertise of the service provider, loss of customer feedback, inability to deal with special needs and exceptional circumstances.

Although SMEs have a high potential for suppliers, Kummer [1995] lacks SME-specific logistics services. Small service providers are more suited to small businesses because they are flexible and more closely related to them (Harrington, 1995). Holter et al. [2008] explores a British metalworking enterprise that has been successfully growing on the market, with an

annual growth of 40%. It transforms its concepts of logistics, once the company did not know how to take advantage of the competition in the transport market or get a good service at a competitive price. After focusing on logistics activities, the enterprise is given an opportunity to respond more adequately to market conditions and to obtain more attractive offers from its suppliers. In addition, the company identifies customer service levels, becomes proactive, and acquires a level of expertise in transport activities. For this purpose, they analyze the delivery parameters of about 300 shipping containers worldwide, such as shipping costs, transit time, traceability, delivery time, transport management costs. As a result, the company takes the following steps to optimize the outsourcing of its logistics activities:

Step 1: Systematization of information in the sphere of the logistic services available to the company and the modified volumes of shipments in specific parameters. This makes it more attractive for logistics service providers, where it gets more attractive offers from them.

Step 2: Organizing auctions among your suppliers to get the best deal. For this purpose, the company determines in detail the parameters of its needs. The bids submitted compare it through mathematical models for calculating the cost of logistics. As a result, the organization optimizes two essential parameters: service / value of service and delivery time / transport costs.

Step 3: Defining Key Performance Indicators (KPIs). They are used by the company to evaluate their logistics service providers. The indicators are selected to focus on the analysis of service errors and transport time (for example, average lag time), based on the results obtained, their respective costs and losses are calculated.

After applying the above analysis methods and corresponding optimizations with its logistics service providers, the company gets improved service and competitive quotations.

According to Dimitrova [2018], logistics outsourcing provides some additional benefits to the organization. These are to improve logistics performance to an extent that cannot be achieved in the individual enterprise performing the logistics processes independently. Dimitrova and Dimitrov [2017] define an approach for determining the costs of outsourcing solutions. They consider that defining the optimum limits of the enterprise's activity is a major strategic problem in the field of production and logistics management, therefore they detail the aspects of the analysis of

the strategic, time, organizational and cost outsourcing decisions, defining the basic and additional evaluation criteria costs in favor of management.

Conclusion

In summary several general conclusions can be made in regards of the logistical outsourcing of SMEs. Research papers on the subject do not sufficiently address the theoretical aspects of the problem, or, if they do, the most commonly proposed explanations relate to transaction costs and competences related to resource theory. According to surveys, the level of logistics outsourcing, also seen under other names - for example 3PL (third logistics partner) or contract logistics - has continued to increase in recent years, ranging from individual to more sophisticated services, and this is happening more often in more developed than in developing regions. There is no single opinion as to whether the size of the company is a factor for the unpredictability of logistics outsourcing. Some authors consider this to be uncontested, but for example, according to Bardi and Tracey [1991], that is not obvious.

Logistics outsourcing research identifies some significant differences between large companies and SMEs but they are less tangible when the company is engaged in international trade. According to Chao and Shah [2010], the logistics outsourcing of SMEs is based on tactical rather than strategic purposes. When choosing a logistics service provider the company may ignore the possibility of lowering its costs at the expense of other considerations.

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APPLICATION OF DIGITAL MARKETING STRATEGIES IN TOURIST BUSINESS

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Abstract: *The role of the internet and digitization in the purchasing behavior of tourists led to a change in marketing plans, which are becoming more and more digital. In addition, Lambertan and Stephen make a systematic review on the basis of three key themes emerging from 2000 to 2015: (1) Digital Social Media and Mobile Marketing (SPMM) as a mediator for individual expression, (2)SMLM as a tool for decision support and (3) SMLM as a source of market information.*

The purpose of this paper is to highlight the leading role of digital marketing in the tourism industry. The following objectives have been solved:

- *The role of the Internet through the eyes of tourists is explored;*
- *Statistical data from a study on on-line behavior of tourists are used;*
- *The tools and platforms for digital marketing in the tourism industry are highlighted.*

In conclusion, the emphasis is placed on the fact that properly implemented digital marketing strategies in tourism will contribute to the creation of loyal guests.

Key words: *digital marketing, strategies, on-line platforms, reputation management, tourism.*

INTRODUCTION

Digital marketing is the marketing of products and services with the help of digital technologies. [20] Digital marketing is often referred to as online marketing, but it also contains mobile, radio, television and other types of digital media used for promotional purposes. [22] Digital channels belong to the address media - all digital devices connected to the Internet have their own IP address. Computers, tablets, mobile phones, digital TVs and more. have their own addresses for example. These addressing devices produce unique information that can be controlled, analyzed and used for marketing purposes. In this way, digital marketing has become more purposeful and closer to the needs of the user than traditional marketing. Address digital channels make the results easier to compute through information analysis tools, and provide opportunities for constant optimization and increase the effectiveness of marketing campaigns by creating tailor-made ways of communication and content. Thanks to breakthroughs in technology and high-speed internet, travelers nowadays book their vacation online. They can compare offers, rates and reviews within a few minutes and have more choices than before to choose where to book and stay.

Therefore, the tourism industry has changed from a business-oriented to customer-oriented, where the customer's interests are at the forefront. "They disseminate their opinions, impressions, expectations and disappointments in society through friends, parents, classmates, social media and the most modern information and communication technologies". [7] Companies are making efforts to create a strong presence on digital channels, with special emphasis on mobile channels, for example, applications. In 2015. online sales were 533.52 billion US dollars and this figure is expected to grow to 762 billion. dollar by the end of 2019. A Google survey (Thinkwithgoogle 2014) shows that search engines and hotel websites have become the most popular travel planning tools online.

According to an Expedia (2016) [18] study, consumers visit about 38 travel sites before booking. This fact is already a challenge and, at the same time, a huge opportunity for hotels. Customers are looking for better alternatives. They want a nice experience at a good price.

In addition, online travel agencies (Expedia.com, Booking.com) provide information about free rooms from several different online sources, thus reducing the need for the customer to book directly from individual hotel sites.

Having many different options, it is extremely important to provide visitors with a reason to book by offering the best price and good shopping experience through a site. The latter can be achieved with a good level of service design and by improving the hotel website.

In order to better understand the focus of the thesis, an overview of the concept of social media is given in the following rows.

A.M. Kaplan and M. Haenlein (2010) provide a more technologically defined definition from a marketing point of view - "a group of tools that are free or almost free of charge, enabling marketing professionals and the community to create a meaningful and meaningful online conversation." Some examples of social media are blogs, photo sharing sites, videos, social networks, audio podcasts, internet radio, and more. Stern (2010) explains the social network in a pure and uncomplicated way - "What enables anyone to communicate with everyone ... Customer-generated content delivered through easy-to-access online tools."

Solis (2011) has its own way of defining the notion of social media by managing to combine the above-mentioned definitions and seeing it as "many things for many people and introduces far more than technology ... a social renaissance in which a dynamic ecosystem assisted by flowering cultures and lifestyles ... platform for socialization of the media; online means that support conversations; relationships between friends, relatives and influential people; collaborations; redistribution of influence; a call for the animation of personalities and viewers, as well as the stories that connect them to one another; compassionate; opportunity and privilege ... the democratization of information turning people into publishers; this is the change from a common transmission mechanism - one to many, to many to many models, rooted in conversations between authors, people and followers. "

According to Levinson and Gibson (2010), a social media marketing specialist should have the following characteristics: first, he should not be involved in the enthusiasm of new products before testing the tools they handle and analyzing the results they actually carry. Second, a marketing specialist should always be curious to try new options; it has to "combine different elements of marketing and strategies into different models." In a fast-paced world of communications, social media marketers must always be prepared for new opportunities and

challenges. Another important feature of a marketing specialist is transparency.

By gaining access to a wide range of information that customers nowadays have, it is almost impossible to be misled without noticing that. It is therefore supposed that there is openness, honesty and morality. Everyone knows that the client is a king and for this reason a marketing specialist must be socially oriented - to connect with clients, help them and listen to them, keep track of their values and expectations and then overcome them. "The enrichment of the tourist product with exciting and emotional experiences is a key competitive advantage, promising engaging the base to stay again and again and is synonymous with successful and sustainable business." [8] Marketing professionals should always strive for quality rather than quantity; a large number of followers or likes mean popularity but not necessarily a great profit. A smart approach to technology is the way a marketing specialist has to proceed. Keeping up with the latest trends for the latest products on the market, inventions, etc. will bring profit to the business. Lastly, it is vital to have high leadership skills to strive for long-lasting good results.

Levinsson and Gibson (2010) also identify some qualities that marketers should take into account when engaging in social media strategies. Namely: Name - the name of the company must be distinctive and impossible to duplicate with another, it must be of interest and, above all, it must be easy to pronounce in any language.

Strong current branding strategy - It is vital for a brand to have a good strategy that can be implemented in the long run with the necessary patience and self-reliance. Being in a position to listen during a dialogue - it's always about dividing yourself from your other competitors by listening to your customers' stories as well as their testimonies. Quality - everything that is involved is the service that is available to customers. Satisfied users are happy users who can make profits through positive feedback from the mouth. Distribution - it's about locating, working on all online distribution channels, and having the opportunity to work from remote locations. Freedom and Diversity - giving free prizes is always an effective way to attract a clientele. Recommendations and award programs - Most companies now have similarities, thus showing how much they value a user to return to them and the feedback they will be given

rewarding them with different incentives. Being liked - the way a marketer sells his product is just as important as the other ways. That is why to be liked by society is the key to success. This can be achieved through small but meaningful gestures, for example - saying "thank you" while answering quickly to individual personal or public questions without using overly aggressive evidence when you defend your thesis in response to criticism, but rather to build bridges between yourself and customers; at the end - it's important not to be too cheeky.

The gradual introduction of direct marketing principles allows contact with certain target groups on an individual basis. Further development is an interaction; not only the vendor has access to the customer, but the customer can also access manufacturers via the internet as the cheapest and most convenient way to communicate. The emergence of interactive media creates new opportunities for companies to present themselves through a website, and direct online booking overrides traditional distribution channels. As with all marketing activities, it is important to first define the client's profile, define the communication goals, and then choose the methods of advertising on the Internet.

According to a survey, 3/4 of internet users admit they are willing to pay significantly more for a product that has a good user rating on the web. New communication channels include social networks such as Facebook (according to worldwide research effectiveness marketing communication is 82%), You Tube (73%), followed by Twitter, LinkedIn, Flickr, Foursquare and others. All of them can provide free advertising and contribute to improving the company's image and customer relations. By creating an account, benefits are gained, such as Facebook synchronized Facebook information, feedback, distribution of invitations to hotel events, daily menu in the restaurant, etc. Mobile marketing (including bluecasting) adds traditional marketing tools and effectively represents restaurants and accommodations with readiness for action and responsiveness. Discount portals have emerged in recent years that offer an easy and inexpensive propaganda on the principle of mass purchases with a significant discount. They represent a new channel for marketing communication suitable for the presentation of enterprises (eg Glabor Media Group, VipOfferta, Group, Rio.Bg, Top20Offers, etc.) Systemic media monitoring, surveys,

automated mood analysis serve to outline the attitudes of potential customers and exploring their preferences. Cooperative advertising, the use of useful links and partnerships to share the cost of marketing communication is one of the possibilities for effective advertising.

In conclusion, all these features contribute to the reputation of a business. The fundamentals of good reputation are truth, promises, feedback, customer experience, brand control, conflict management, and more. These properties will help determine the goals that marketers put in when they try to set up real online communication targets that are crucial to this work.

THE ROLE OF INTERNET IN THE CONTEXT OF TOURIST PERCEPTION

According to a Eurostat study [16], the internet is a very important channel for the tourism sector, as four out of every ten Europeans are looking for online travel information. The same survey reveals that about 65% of Europeans who used the Internet in 2015 made online purchases, and 52% of these purchases were related to tourist products and services.

According to several authors [14], the internet is currently the preferred source of information for tourists when seeking a destination for their travel. In addition, the image of the destination may be formed by the integrated marketing of the participants in the tourist product of a destination. Additionally, the internet allows tourists to actively advertise content related to their vacation as they can share opinions, photos and videos with other tourists on many online platforms such as social networks, blogs, and more. [10] "This interaction with digital channels is determined by engagement. Customer engagement is "a psychological state that is based on an interactive client experience with a focal agent / subject within a specific service relationship." [1] Cabidou, De Carlo and Piccolli (2014) also contribute to science by identifying three distinctive social media capabilities for engaging customers in tourism: ongoing engagement, personalized engagement, and engaging engagement.

Internet access and use are increasing and, as a result, the way consumers choose and book hotels has changed in recent years. For this reason, managers should be aware that once a hotel is present on the Internet and shares content (location, photos, prices), it allows anyone to

consult with them regardless of the location and time they are searching for. The availability of data on the behavior of Internet users should be considered by hotel managers as an opportunity for tourism and hotel industry development. In this way they have to strategically plan, build and update their presence online. New online media offers managers a new way of communicating and the ability to identify audiences and reach them by sharing specific content. "A key stage in the communication process, however, is the recognizability of the agent sending the message. Today big companies such as Google, Apple, Facebook have established themselves in the market through their identity." [9] These resources allow for easier, cheaper and non-geographic limited contact between the hotel and its suppliers, partners and guests.

ONLINE BEHAVIOR OF TOURISTS

According to a survey by Deloitte (2016), the motivation to visit a tourist destination is 34% of the information we find about it on the internet, while 31% are motivated by suggestions from family members and friends or opinions received via the Internet. This online sharing is called e-WOM [2]. This e-WOM affects consumers' purchasing power. E-WOM is becoming more and more popular due to the increased use of digital marketing tools such as online forums, blogs and social networks. For example, some hotels and online booking platforms allow guests to write down their opinions about their stay to help other guests when choosing them. According to the Deloitte study (2016), tourists make the bulk of purchases of travel products (transport, museum tickets, accommodation, etc.) in 2005, and plan their travels through books, travel guides and travel agents. Only ten years later, the same study reveals that in 2015 it is possible to carry out all these actions via the Internet via a smartphone or computer.

ONLINE REPUTATION MANAGEMENT: DIGITAL MARKETING INSTRUMENTS

Verhoef, Reinartz & Krafft (2010), [12] say that tourism services are difficult to assess, but with the development of social networks and websites such as TripAdvisor and Booking.com, this task is facilitated by more active communication and relationships between customers and travel providers services, making

it multi-directional with the development of the Internet. This means that not only hotels communicate with their guests, but guests also create content and share opinions with the hotel and potential guests, which can affect the reputation of the hotel.

When we talk about the hotel industry, Wei, Miao & Huang (2013) [13] come to the conclusion that the right and proper reaction of hotels to guest reviews and reviews allows them to discuss and justify their failures, to convey confidence to potential guests, and build an online reputation on the e-market. According to Snezhina Kadyeva, [4] in almost no other industry, as in the hotel industry, the necessity of the application of reputation management is not so strong, especially at the stage of the growing influence of the social media. Maintaining a good image is a key factor in the success of hotel sales and winning loyal customers. It is essential that hotels have a good online presence but not enough to be online only if potential guests can not find the hotel in the digital world or if the information provided does not meet their search expectations.

Committed behavior led to a change in the management and marketing strategies of companies in the tourism sector, prompting them to increase the use of digital marketing tools. This information, along with targeted audience surveys, allows managers and dealers to plan a digital marketing strategy that is suited to target audiences, both in form and in content (Experian Marketing Services, 2015). [17]

The World Tourism Organization (2014) highlights the potential of the internet, new technologies and digital marketing for tourism. E-mail marketing, websites, blogs, social networks, along with mobile apps and online booking platforms are key tools in marketing strategies.

Social networks can be defined as a group of Internet-based applications that allow users to interact, communicate and share ideas, thoughts and experiences. Today, millions of users use daily social networks to receive and send content. This new form of communication changes the way people relate to each other because it allows them to share their ideologies and opinions in different formats. The availability of hotels in social networks and the promotion of dialogue with guests is essential and should be done with greater frequency and intensity. Today, it does not matter what a company says about itself, but what they say

about it. This study analyzes Facebook's social network because it is considered to be the most relevant for the hotel sector, given its functionality and the large number of users. According to Leung and Baloglu (2015), [6]the attitude towards the Facebook page of a hotel is influenced by the consistency of the site with the value of the hotel client and the personal attitude towards other users. Interested in hotel reservations and mouth-to-mouth distribution are two significant consequences of Facebook's marketing efforts. The social media experiences of hotel guests influence their attitude towards social media, which in turn influences their attitude to the business. In addition, the perception of a hotel's followers about the site's image influences their hotel reservation intentions and, in turn, the intent to distribute e-WOM. It is therefore essential that hotel managers strategically plan the use of digital marketing tools that are related to online bookings.

PLATFORMS FOR ONLINE RESERVATIONS

According to Eurostat (2016), [16] 55% of the 2015 accommodation reservations in the European Union are online. About 148.3 million online bookings are made annually, directly on the hotel's website, via e-mail or via online booking platforms (Statistic Brain, 2016) [21]. It is therefore essential that hotel managers strategically plan the use of digital marketing tools that are related to online bookings.

Online reservation platforms are one of the most used ways to book online, allowing guests to easily and quickly compare information and prices between different hotels, giving them more security. The main advantage for guests when booking via online platforms is the presence of other users' opinions, which ultimately are influencing factors in the choice and decision to purchase a service as they provide information from a reliable point of view. According to Eurostat (2016), 84% of consumers are influenced by their choice of holiday destination from the opinions they see on the internet. It is therefore important for managers to offer reservations on their sites through these platforms and to monitor the reputation of the hotel on the web by taking advantage of guest opinions and assessments to improve the services offered. In this study, the on-line booking platform is Booking.com.

TripAdvisor was founded in 2000 and is considered to be the world's largest travel website and supports the motto "Learn More, Book More, Travel More". This website allows users to consult and create information related to the services provided in the tourism sector around the world. In the third quarter of 2016, according to TripAdvisor (2016), the site had more than 390 million visits. Due to the large number of reviews and recommendations on a destination and its accommodation, this website needs to be analyzed by marketing departments.

CONCLUSION

Digital marketing already plays an important role in the communication and marketing strategy of the tourism industry in the Black Sea region. The use of digital marketing tools in the communication and marketing strategy is done by tourist business units as they are aware of the fact that their potential guests are increasingly using modern technologies. However, most of them need to significantly improve their performance to exploit the full potential that is available.

Most of them use several digital marketing tools. However, they still have very little interaction with online users because they do not all encourage their guests to share feedback about their stay and even less are those who have the habit of responding to positive or negative comments that guests share in the surveyed platforms - social networks, Booking.com and Trip Advisor. However, we must argue that changes in the use of digital marketing strategies are in line with trends in digital marketing, so increasing and improving the implementation of digital marketing tools is expected. The strategic use of these tools will allow tourist businesses to improve their communication and have closer links with guests and potential tourists. Managers and marketers should take advantage of this link and learn from guest reviews as well as the indicators and statistics provided by digital marketing tools that, if properly applied, can facilitate interaction and promote the loyalty of the guest.

"The rise of social media has a major effect on the way companies manage their brands. Key features of the social media environment that has a significant effect on branding are the shift from company to customers as the main authors of the brand-related information in the process of market placement; a high level of interactivity

represented on social networks by customers and brands; a variety of channels and various reverse links for brands that can not be easily controlled "[3].

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MODEL FOR ANALYSIS AND EVALUATION OF CUSTOMER RELATIONS WITH TOURISM

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ABSTRACT

CRM - Customer Relationship Management is an up-to-date, innovative marketing approach to making effective management decisions in any modern tourism enterprise. In this sense, we believe that for the successful management of the clients in the tourism industry, the analysis of the interrelations between them and the business requires the logical link between the elements / stages /, factors, indicators and effects based on an integration model. In the present work, the author presents a conceptual model for customer relationship management in tourism, focusing on the claim that CRM is an interactive strategic marketing process.

Key words: CRM, marketing, customer, tourism.

For the successful management of clients in tourism industry, the analysis of the interrelations between them and the business requires the logical link between the elements / stages /, factors, indicators and effects based on the integration model.

Emphasizing on the assertion that **CRM (Customer Relationship Management)** is an interactive strategic marketing process, we offer the following conceptual model for managing relationships with clients in tourism (Figure 1).

The model is designed for:

- Analysis of the indicators contributing to the formation of relations between the client and the tourist organization.
- Determination of the factors influencing the development of the interconnections between the client and the hotel organization.
- Identification of problems and challenges in CRM.
- Suggestions and strategic marketing opportunities for improving CRM in hotel management.

The presented customer management model in the tourism industry consists of separate blocks. Each block contains structural elements and processes that are interrelated and interdependent as a result of certain relationships between them and participate in the overall process of managing relationships with customers in tourism.

The structure of the author model contains:

➤ **Milestones in the process of management of interconnections with clients in tourism:**

The first stage includes:

- **Consumer analysis.**

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.

- **Fragmentation (segmentation) of users.**

Analytical evaluation begins with the identification of the main customer groups and segments defined in a unique set of characteristics and lines of behavior. By identifying the most valuable, permanent, and expandable segments, as well as the unique group with their deviations, in-depth analytical methods can be applied to customer profiles, new information can be found, and programs to achieve goals. As a basic segmentation criterion, we can point to the individual-person relationships that enable the tourism industry to create more and more new markets, not just to divide the existing ones. Individual-to-person business-to-client relationships on the other hand

create lasting dialogue, build stable and long-lasting relationships, and sometimes go loyal.

- **Creating client profiles and models**

In-depth understanding of users requires the construction of polymer profiles that take account of all customer data. Profiling allows each group to obtain a name based on the predominant features revealed by the fragmentation process. The main priorities to be taken into account when designing the customer model are the consumer preferences and the benefit that individual tourists receive.

- **Selection of target groups - clients / users of a tourist product.**

The choice of customer target group or client selection requires good fragmentation, and then a sample of the most profitable clients' profiles has to be taken. Ultimately, the goal is to identify the best candidates for marketing programs, where the company focuses its resources and efforts. The aim is to distinguish the clients of the tourist organization from reaching the desired level of return on investment. This can be achieved by applying the Hungarian algorithm for selecting customer target groups [8].

The second stage includes:

- **CRM strategy**

The strategy in general is a plan to achieve specific goals of the tourism organization. Regarding the CRM strategy, Stanimirov concludes that we are also perceived to be a process whose implementation is an integral part of the marketing strategy and the overall business strategy of the respective company and is realized through specific procedures and tools called CRM tactics [6]. Logically, CRM tactics determine the model of market impact for attracting, retaining and developing the customer of the tourist enterprise.

- **Designing an organizational structure**

Each company has the opportunity to build a different organizational structure, depending on the market conditions and the managers' vision [6]:

- ✓ Functionally based structure - emphasizes the link between specific marketing functions;
- ✓ Product-based structure - the functions are grouped according to the product offerings to the target market segments;
- ✓ Client-based structure - oriented on specific types of market segments;
- ✓ Geographically based structure - Task grouping can be done geographically on market performance.

The specificity of CRM determines to the relevant organizational structure the establishment of a department with a manager that is related to the activities related to the implementation of the CRM strategy.

- **Designing a CRM technology model**

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. By clarifying the vision of its model of governance, each tourist enterprise needs to make its choice for a software solution. Finding the right CRM software that combines the company's strategies and goals enables the company's managers to develop a strategy to increase sales and profits in the long run. CRM software provides easy access to customer data, purchases and preferences, which is a prerequisite for making the right management decisions. CRM software should include access to centralized customer data, purchases, and all communications (telephone, e-mail, exchanged documents, meetings). The availability of this information in combination with the use of tools such as document / e-mail template generation, use of frequently asked questions lists, chat scenarios and order picking lists, quick access to price lists, etc.) are a prerequisite for effective communication with customers and increased satisfaction with the service.

The third stage includes:

- Implementation of information technologies

The main task of information technology is to reproduce, modify, process, distribute, automate, and systemize the relevant information. Information technologies provide an opportunity for a "snapshot of the state", ensuring better results for the interconnection management process. They can integrate with different client bases, enabling them to work in a more dynamic environment, ie. to achieve results in real time. This reflects a drastic reduction in costs and time spent on storing information. The uncertain and rapidly changing global macroeconomic environment (economic growth rate, unemployment rate, inflation, etc.) leads to distortion of economic information and uncertainty in the taking and implementation of economic decisions by firms [11]. Analyzing consumer actions through information technology can identify diverse customer behavior patterns and identify unique sales opportunities.

○ **Communication process**

Through communication, the tourism organization initiates a dialogue with specific target markets by creating, presenting and sending coordinated messages to them. The CRM communication process makes it easy to turn potential customers into real. The pursuit of a large number of potential customers inevitably leads to increased sales and profits. But managing the process of turning a potential client into a real can not be effectively managed without the use of technological tools embedded in a CRM system. Such tools are calendars, reminders, the possibility of serial actions for fast communication with a large audience, etc.

The communication process improves customer profiling and targeted marketing by enabling the CRM system:

- store detailed customer information - their habits, purchases;
- Introduce the information in the system in an easy and automated way (eg integration with other systems used by the company);
- to maintain a convenient client profiling interface (eg through filters where the system user chooses to which customer the selected target group is selected);
- use a variety of communication channels for better CRM functionality by timely sending messages to the target group.

Additionally, for marketing purposes, it is important to know the role of each participant in the communication process. Following this market logic, we can confirm the conclusion that in order to develop its market, to successfully sell its services and goods, the tourist enterprise must know in advance the causes and circumstances that make the individual individual as a tourist to be able to influence or use them in their own interest [5]:

• **Establishing interconnections**

Following the deployment of information technologies and the realization of a communication process between the client and the tourist organization is reached to the point of establishing interconnections. Structured content in a database of data sources allows you to read parameters and details for the right customers. The marketing toolkit helps the process of building relationships between the client and the tourist organization.

• **Solving problems**

As a key factor in customer retention, we can highlight the ability of a tourism organization to respond effectively to problem situations with its

users at every stage of service provision. The need to build a comprehensive company philosophy on solving customer problems is becoming increasingly clear in the face of a highly competitive market environment. Market competition creates incentives for using more advanced technologies, improving professional qualifications, improving work organization, speeding up the transfer of science and technology, which favors extensive economic growth [9].

One of the main possible problems is the complaint. In general, she meets in the hotel industry when customer expectations differ negatively from what they receive as a service. The result is consumer dissatisfaction. This situation gives us reason to claim that complaints provide useful information about consumer dissatisfaction and therefore need to be registered and analyzed. In other words, complaints give hoteliers the opportunity to identify specific problems with their customers and to react promptly to their remedy. Therefore, customers should be encouraged to submit complaints, which requires hoteliers to provide accessible information-communication channels to be made.

The moment of solving the problem with the particular client is extremely important on the one hand for its detention and on the other hand for providing a higher level of satisfaction. The result for the tourist enterprise is to keep the customer up by increasing loyalty and profitability.

Indicators contributing to the establishment of interconnections between the client and the tourist organization:

• **Initial contact. Phase 1:**

- Purchase
- User Value (utility)

• **Customer satisfaction. Phase 2:**

- Evaluation
- Comparison between expectation - perception
- Conformity (non-compliance)

• **Customer loyalty. Phase 3:**

- Perceived risk
- Commitment
- Trust
- Positive attitudes

• **Customer engagement. Phase 4:**

- Follow-on purchases
- Cross-over purchases
- Recommendations

- CRM impact factors:
 - **External factors:**
 - o Custom features
 - o Past user experience
 - o Motives - search for diversity
 - o Tourist needs
 - o Expectations of the tourist
 - o Tourist facilities
 - o Alternative opportunities for the tourist
 - o Price restrictions
 - o Ready to be bound
 - **Internal factors:**
 - o Customer engagement opportunities
 - o Quality and functionality of the services offered
 - o Competitive behavior of the enterprise
 - o Interaction of company personnel
 - o Service management

The structure of the conceptual model gives us reason to claim that there is a close link between the content elements and the stages of the CRM process. On the other hand, the goal of the author is to achieve the resultant effect, by following the impact of the factors and indicators creating relationships with the client, namely:

➤ **TOURIST RESULTS:**

• **Forming a value**

Adhering to the many views of marketing and sales specialists, we firmly believe that the best way to keep customers and achieve long-term relationships with the travel company is to create value. What is value for the customer? The value for the customer is the extent to which a good or service is perceived as satisfying its needs, related to the willingness and ability of the customer to pay for it. In order to obtain a product or service, the client provides the resources it owns. What kind of goods would be divided and what efforts would be made to acquire the product depends on the consumer value of the product, namely the ratio between the given and the received in return. A thorough reading of the specific issues gives us reason to assert that the value for the client is to get the best offer for the least invested resources respectively.

E. Stanimirov believes that "the benefits to the client include the value of the service, the value of the staff that served the client, and the company's image" [5]. Each tourist company must be aware of the value it provides to its customers at any time in their dealings with them, but it is just as important to match the value to that offered by the company's competitors. Only in this way is it possible to

highlight added value, which is the basis for creating a competitive advantage in the business. Market competition encourages the use of extensive factors of economic growth (using more advanced technologies, more efficient organization), thus achieving greater return on investment and greater profitability at company and national level [10].

RESULTS FOR THE TOURIST ORGANIZATION

• **Attracting new clients**

The attraction of new clients is mainly related to making decent and plausible proposals from the tourism organization that meet specific needs. What matters is that CRM supports these suggestions and contributes to more efficient engagement with potential customers. First, "buy" the customer's contact, then work with him for subsequent purchases.

• **Profitability from long-term customers**

It is good to clarify what is profitable before specifying the concept as a benefit to the tourism organization. As a profitable client, we generally accept the one where the net revenue from the respective sales of the particular client is higher than the costs incurred for that customer, the profitability ratio for that client is low or high, depending on the revenue / expense ratio for / for that client. All customers are important and equal, but some are more important because they are more profitable. Increasing cross-selling and selling additional products to existing customers increases profitability.

• **Ending the relationship with unprofitable clients**

The ability of CRM to provide information on the number of purchases, the type of services purchased, etc., and to analyze the customer's contribution to the profit of the organization, allows for the termination of relationships with unprofitable clients. This means that during the interconnection period if guaranteed more cost than revenue, the client is unprofitable for the tourist organization. That is why the assessment of return on investment for each client is very necessary and influences the profitability of the business concerned.

• **Optimize marketing activity**

By accepting marketing activity as part of the business process of each tourist enterprise, we should specify the essence of the concept of "optimization". In general, it is an improvement of consistent actions aimed at achieving the objectives of an enterprise by choosing the best

option for their implementation. This is an inevitable process with a view to the effective functioning of a modern company, and each process has a specific purpose, consistency of the main activities and the expected results. Optimization is tested according to certain criteria. For a business process where marketing is an accent, such criteria are cost, duration and number of sales, and so on.

Given the benefits and benefits of implementing CRM in tourism, we can also highlight the effects of optimizing marketing activity:

- Reduce the time to achieve the goals of the tourism organization;
- Establishment of cooperation between the main and auxiliary departments;
- Increasing customer satisfaction;
- Improving the financial performance of the activity at the expense of proper allocation of resources;
- Opportunity for business scale;
- Reducing the expenditure side of the budget;
- More accurate planning;
- Improving the management of the tourist enterprise;
- Removing individual departments;
- Opportunities for new resources for the development of the tourism business.

- **Efficiency of hotel business**

The notion of "effectiveness" in specialized foreign and Bulgarian scientific literature is treated not only by a wide range of authors, but also over a wide range. However, "abundance" of traditions and definitions can clearly be said to be insufficient to discover and develop service efficiency. A significant part of the researchers [4] examine the concept of "efficiency" and generally define it as the ability to achieve a goal. Without going into the scientific discussion, we will adopt the definition of Dubeva for the purposes of this study [1]. According to the author, efficiency in the hotel industry can be defined as "reasonable use of the available resources (tourist, financial, material, labor) to produce a quality product that satisfies the needs of hotel demand and in sufficient volume to ensure the most appropriate size profit ". It is clear from the definition that performance determination is carried out at a new level, including concepts such as product quality and meeting needs.

Kazantzheva defines effectiveness as a comparison of the results and costs needed to obtain them [3] and adds that research and performance analysis are the basis for

determining the qualitative characteristics of a system (economic, social, political, cultural). According to the author, the measurement of the effects is done by means of economic and non-economic indicators: volume of turnover, services and goods produced, gross income, profit, quality of service, working conditions, customer satisfaction, etc

Based on these theoretical traditions, we can link efficiency to the notions of "effect" and "satisfaction". It provides an opportunity to assess the extent to which the services offered by the tourism organization satisfy the needs and expectations of the consumer in the best way, the degree of satisfaction with the activity is measured. Building on this presumption, the result will be the creation of satisfied and loyal customers, which in turn will lead to an increase in the revenues of the tourism organization. Non-economic effects therefore contribute to the efficiency of the hotel business.

Summing up the majority of the existing definitions and opinions, we can come to the logical conclusion that efficiency in the most general context indicates the relationship between the achieved result and the expenditures (labor, financial resources, etc.), that is, effectiveness is related to the economy of actions and reveals whether the objectives set have been achieved.

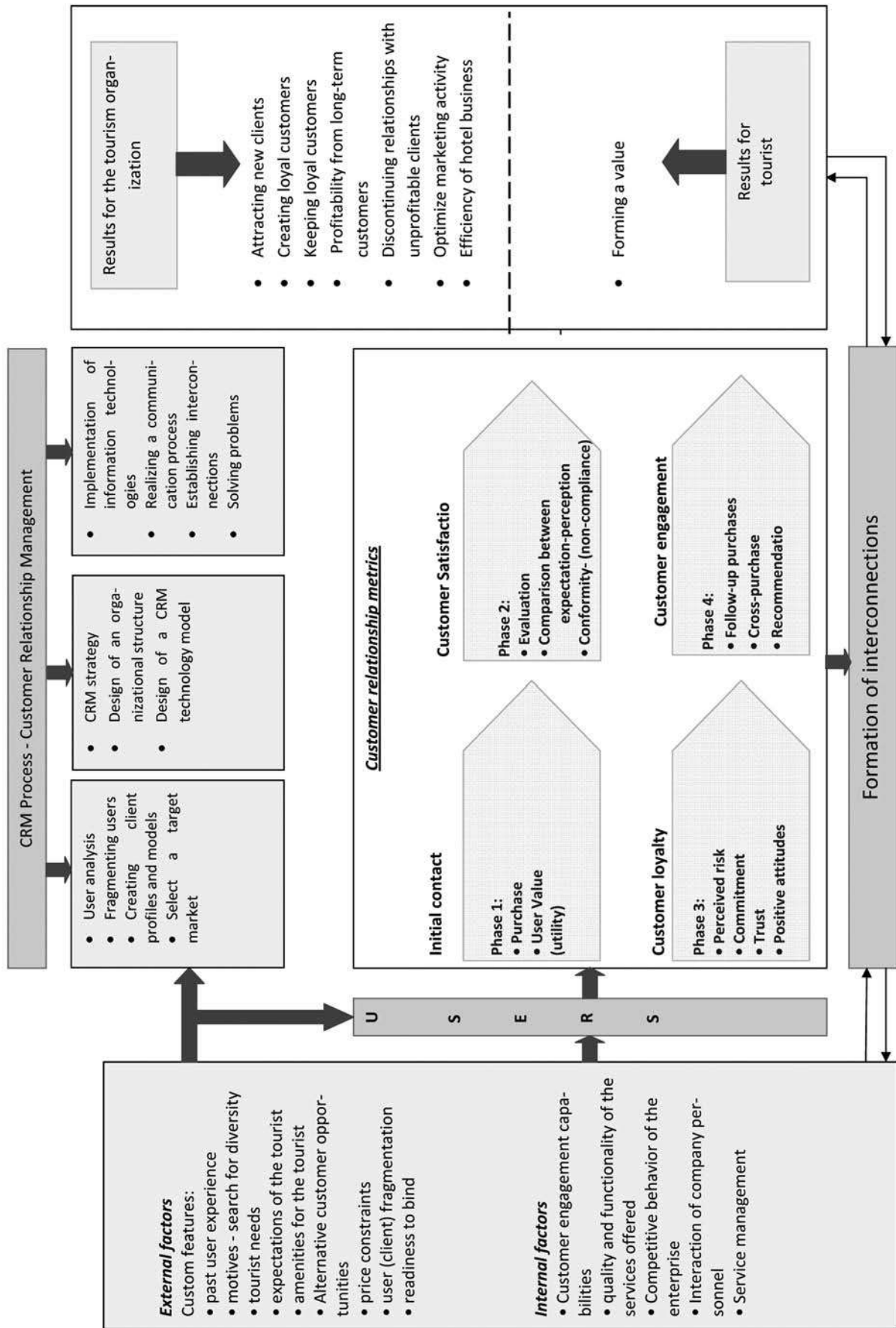
The analysis of economic efficiency is carried out through a number of indicators. They all disclose what economic effects (useful outcomes) the company realizes with a unit cost or unit of resources. Economic science defines effectiveness as the amount of economic effect that is created with a unit cost or resource unit. Efficiency is calculated using base relationships.

The economic effect is a useful result, and economic efficiency expresses the beneficial outcome that is achieved with the participation of a unit of expenditure or resource. In other words, efficiency is the result of resource and cost recovery, the quantity of which is measured by a comparison between the effect (result) expressed by different quantitative or qualitative measures on the inputs or costs involved. It is important to emphasize that the effect is expressed in absolute terms, while efficiency through ratios. In this connection, we can add to the conclusion by Lukanova, to whom we too agree with the unambiguous opinion that in the hospitality sector considered as an industry of hospitality, the economic effects are a consequence of the non-economic ones [2]. Revenue and profit will

grow if there are satisfied and loyal customers. In this sense, we consider that the non-economic effects of hotel services are of paramount importance and the functional link between supply and demand is the main thread for improving the efficiency of the enterprise. Some authors [7] proposed optimization models that can be applied in the tourism organization. Their advantages are that they also apply to fuzzy parameters and processes are considered over time.

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IMPACT OF DEVELOPMENT FACTORS ON RELATIONSHIPS – CUSTOMER AND HOTEL ORGANIZATION

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ABSTRACT

In the current stage of tourism development, the problem between the client and the business is becoming more and more important. With this publication we try to analyze some aspects of the relationship between client and tourist organization. We take into account the impact of some factors on impact on the development of interconnections.

Key words: CRM, marketing, customer, tourism.

Issues related to customer-business interrelations are increasingly growing in today's development. This publication attempts to analyze some aspects of the problem.

With the development of information and communication technologies and digital technologies, an opportunity has been created for integration between databases and other software applications used by companies. This provided a favorable opportunity for the tourist business in several directions:

- To improve the service process by taking advantage of the features - speed, quality, security, efficiency, complexity;
- to facilitate their contacts with their potential and real clients;
- increase the market share in the client's portfolio.

In order to achieve these results, modern tourism organizations need specific, structured and effectively managed information, which is practically feasible through the introduction of technological innovations. This gives reason to justify the fact that tourism organizations have the ability to measure their client's return and its long-term value to the company, the sale of additional specific services, detailed customer database research, and personalized profiling of messages. It is unacceptable nowadays not to outline the capabilities and benefits of CRM (Customer Relationship Management) as a system, especially when it comes to technological innovation in tourism practice. This is conditioned by the development and accessibility of the technologies and the possibilities for integration with databases and other software applications

used by companies. Consequently, new technological dimensions are a prerequisite for the success of the tourism industry in a competitive business environment.

Regarding the origins of CRM technology, we can refer to E. Stanimirov's research, according to which their functionality was developed in the 70s of the 20th century through collocators, customer information storage bases, sales management systems. Initially, the idea was related to the desire of companies to synchronize the different channels of interaction with the customer and to stimulate sales. It is possible to believe that SRM systems build on ERP systems (Enterprise Resource Planning), which are a set of integrated applications that allow to create a unified environment for the automation of planning, reporting, analysis and control activities business processes of the enterprise [3].

The purpose of CRM as an information system is to automate business processes in the travel company, ensuring the interaction of all its subsidiaries with customers. This system, on the one hand, is specific to satisfy and retain customers and, on the other hand, serves to optimize the company's business. The CRM system has sophisticated software and analysis tools that integrate customer data from all sources, allow deep analysis and application of results in new solutions to build successful customer relationships. It is this possible feature of CRM that allows you to evaluate the value of each individual customer, identify the most lucrative target markets, and adapt product offers to interactions with each customer.

With conviction, we can mention that the practical direction of the CRM system is linked to

providing a unified client database with detailed and accurate information. Data is automatically imported into an individual client's operational dossier and so all available customer information is unified and organized. Subsequently, different business units use this information to segment, target and respond to customers. With the help of CRM, the hotel organization has the ability to optimize workflows and maximize business benefits. This statement is based on the fact that CRM contains a complete history of customer relationships, provides the ability to sort and classify customers by different criteria, and automatically send emails to target audiences. One of the greatest advantages of CRM is that every employee in the company has access to the data and contacts with the client.

To date, a vast array of analytical technologies has been available, starting with key metrics and statistical reports, and reaching the capabilities of OLAP technology (On Line Analytical Processing), data mining and predictive modeling. Each of the methods gives some information about the client, with each of them having data and analytics for in-depth 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 information gathered 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 quite easy and affordable ways to get a lot of information about the customer, 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.

It is important to note that besides customer information about successful relationship management, customer information is also important. That is why it is necessary to make efforts, to motivate and facilitate the guests of the tourist sites in order to obtain information from them themselves [2].

The practical applicability of the CRM system is to combine appropriate software solutions with business objectives to develop the relationship between the tourism organization and its customers. Effective CRM improves internal business processes while customizing the organization's relationship with its environment.

Based on previous surveys of hoteliers [1] we take into account the influence of the more important factors for the development of the intercon-

nections between the client and the tourist organization. It protects the thesis that the assessment of factor influences is of utmost importance for the tourism business when making marketing decisions related to the management of its clients.

Although the larger percentage of interviewed hoteliers are of the opinion that the marketing concept of business-to-customer relationships will develop successfully in the near future, at this stage hoteliers are not trusted and have no concrete idea of the benefits of development because they are not exploring them. There are trends such as sharpened competition and oversupply can also be a prerequisite for seeking a competitive advantage through a modern marketing concept. The majority of hoteliers point to several factors that they think affects the development of customer relationships:

- the quality of the equipment and equipment;
- the quality of software products;
- Quality of support for hardware and software;
- Qualification of cadres.

Against the background of the reported results, the following conclusions are made:

Almost 100% determine financial resources as a solution to invest in a modern management approach - CRM, if they have sufficient profits, are willing to invest in human and technological resources. The majority of respondents have a positive attitude towards CRM and are of the opinion that it should continue to develop in the future.

All hotels have an online business, but none of the hoteliers calculate the effectiveness of their relationship with the customer because they do not track the revenue and costs of each market segment or type of tourist.

As a result of the survey, we can point out that hotels, as part of the tourism business, benefit from customer relationship management services considerably less than is supposed to be based on general opinion. However, there is a trend towards increasing the percentage of hotels, especially large hotel chains, which are aware of the need for such a type of system and rely on increasingly high quality products. There is quite a misconception in some hoteliers, namely that if a hotel has an electronic website developed, this company makes the most of the services of modern information and communication technologies that have a positive influence on the relations with the tourist.

Most of the hoteliers also realize that one time winning the client and waiting for him to search

for himself is very wrong thinking. They are aware that in order to re-engage with this client, they must provide the necessary actions and "manage" this client successfully by accepting that all these actions can be accomplished through the marketing approach "Customer Relationship Management".

Assessing the various factors influencing the development of CRM surveyed hoteliers almost unambiguously assume that all factors are of the same weight. First of all, the qualitative aspects of hardware and software are mentioned, with 85.5%, respectively. With a close relative share, 83% of respondents believe that CRM staff qualifications, including maintenance, are essential to its development. Only third, with a relative share of 81.5%, is the management's attitude towards this issue.

Interestingly, the responses determining the "low" and "very low" degree of influence of the analyzed factors on the development of the CRM. According to respondents, the CRM staff's qualification and the attitude of management are 6.2% and 5.8%, respectively, are almost twice more than all other factors.

This statement gives us reason to conclude that hoteliers are not yet exploring and unfamiliar with the functioning of CRM, and this leads to a lack of specific analyzes of the factors affecting them.

Undoubtedly, the technical parameters and qualities of hardware and software are essential for successful performance, but without the ex-

cellent qualifications and professional skills of staff without proper management attitude, these technical means would not produce the desired end results. Confirmation of the expressed opinion is also the fact that the answers "I can not estimate" for each of the above mentioned factors exceeds 10% -11%.

In summary, high category hotels have a significantly higher share of using modern marketing tools. The reasons for this particular situation are usually complex: site management understands much better the benefits and benefits of developing such a relationship with the client, has the appropriate resources for this innovative activity; the larger bed base logically leads to the need to use these ways of communicating. The information obtained gives reason to conclude at this stage that some of the hoteliers are not well aware of the differences between traditional service and customer relationship management and are not aware of the possibilities in depth and as a result the result is limited from them.

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HEALTH INEQUALITIES IN BULGARIA IN THE 21ST CENTURY
SOME MODERN ASPECTS OF PALLIATIVE CARE AT THE END OF THE LIFE

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ABSTRACT

The goal of palliative care is to relieve the suffering of patients and their families by the comprehensive assessment and treatment of physical, psychosocial, and spiritual symptoms experienced by patients. As death approaches, a patient's symptoms may require more aggressive palliation. As comfort measures intensify, so should the support provided to the dying patient's family. After the patient's death, palliative care focuses primarily on bereavement and support of the family. It is widely acknowledged that there is still inadequate access to hospice and palliative care worldwide, and with an ageing population who are going to be living and dying with more complex conditions, the demand for care is only going to increase. Historically, hospice and palliative care programs have focused on the needs of cancer patients known to have high symptom burdens. However, the majority of those needing palliative care worldwide suffer from non-malignant conditions. WHO has focused in recent years on HIV/AIDS, tuberculosis and other infectious diseases and now has a major initiative to address the burdens of non-communicable disease. Palliative care is needed for these conditions, but what is also needed is for the global community to work together to help prevent early mortality from communicable and non-communicable diseases. Palliative care, while vital at the end of life, also has a key role to play in this prevention.

Key words: End of life, palliative care, symptom management, health care, health system

INTRODUCTION

While dying is a normal part of life, death is often treated as an illness. As a consequence, many people die in hospitals, alone and in pain.¹ Palliative care focuses primarily on anticipating, preventing, diagnosing, and treating symptoms experienced by patients with a serious or life-threatening illness and helping patients and their families make medically important decisions. The ultimate goal of palliative care is to improve quality of life for both the patient and the family, regardless of diagnosis. Although palliative care, unlike hospice care, does not depend on prognosis, as the end of life approaches, the role of palliative care intensifies and focuses on aggressive symptom management and psychosocial support.

Helping patients and their families understand the nature of illness and prognosis is a crucial aspect of palliative care near the end of life. Additionally, palliative care specialists help patients and their families to determine appropriate medical care and to align the patient's care goals with those of the healthcare team. Finally, establishing the need for a medical

proxy, advance directives, and resuscitation status is an integral part of palliative care at the end of life. [1]

REPORT/EXPOSE/ RESULTS AND
DISCUSSION

All Member States of the European Union are committed to providing their citizens with universal access to high-quality long-term care at an affordable price. With the aging population, the financial and logistical challenges in fulfilling this promise to older people are being overcome more and more difficult. This is now and will become even more pronounced in the future as governments need to work in an environment of growing and competing needs with limited resources. Long-term care is defined differently in the countries of the European Union. They reflect differences in length of stay, covered service users, and the often blurred boundary between medical (non-medical) and non-medical (social) services. Some countries, for example, prefer to focus on pre-hospital outpatient rehabilitation and others on the provision of care in hospitals or similar institutions.

For the OECD, long-term care is a "cross-sectoral policy issue that combines a range of services for people who need help in their day-to-day activities for an extended period of time." Long-term care can include rehabilitation, basic medical treatment, nursing home care, social care, housing and services such as transport, food, housekeeping, and help in organizing everyday life. [2]

Care is usually provided to people with physical or mental disabilities, helpless people, adults and people in need of special help to organize their daily lives. As the OECD notes: "The need for long-term care exists mostly in the higher age groups ... which are most at risk of permanent chronic illnesses leading to physical or mental disability."

As Europeans live longer, public resources devoted to health and long-term care are the second largest component of total social protection expenditure after the cost of pensions and survivors' pensions. By prolonging the lifespan of citizens, there will be an increasing demand for long-term care at home or in an institutional setting.

It is estimated that the total number of people over the age of 65 will increase by 77% by 2050 compared to the beginning of the century. The increase in the age group over 80 will be even higher - 174%. According to a 2007 Eurobarometer survey, the majority of Europeans think it is either unlikely or unlikely, but at some point in their lives they may depend on long-term care.

Against this background, the forecasts of the Economic Policy Committee and the European Commission prepared in 2006 show that public spending on long-term care will increase by 0.7 percent of GDP in 2050 compared to 2004 due to the aging population.

Long-term care is addressed by setting three coherent and related goals for the services offered: common access, high quality and long-term sustainability.

1. Access to appropriate long-term care

It is generally acknowledged that access to health care should not be limited by individual solvency or dependent on personal income or wealth. The need for care should not lead to poverty or financial dependence.

It may be difficult to provide the full care that some people need. For example, efforts in some countries to help patients regain their independence by rehabilitation can be thwarted if some elements of long-term care are not taken up

by some systems based on social and health insurance.

Costs are also a barrier, especially for low-income groups, which may have to bear a share of the costs themselves. In many countries, such as Estonia, Cyprus and Ireland, long-term care payments have been introduced. In Germany, a small but growing percentage of the population (currently 1%) signs a voluntary private supplementary insurance covering the cost of accommodation costs in elderly homes. It is an addition to the special long-term care insurance and social assistance mechanisms.

To reduce the direct costs of care for people, there are different schemes. Among them are:

- Exemptions from personal additional contributions and personal supplementary contributions, calculated on the basis of income;
- Additional financial assistance and social assistance for the elderly, dependent, disabled and chronically ill;
- taking the long-term care of low-income households from the state;
- Equal additional contributions for all countries; and
- Government subsidies for the use of private services.

The general tendency is to deinstitutionalize care - except for people with severe disabilities - and develop tailor-made home care and care in the municipality. Modern technologies like electronic health care, tele monitoring, telemedicine and self-living systems facilitate home care or community care. This change in perspective allows people to have more freedom of choice in terms of the care they need. The result is that people can live as long as possible in a familiar environment in their own homes, close to their family and friends, and can, if necessary, benefit from the support of institutional care. [3]

2. High quality in long-term care

As long-term care as people receive, there are huge differences. It is therefore not surprising that research and reports show some frustration and draw attention to shortcomings. The questions raised range from inadequate housing base and lack of privacy in the homes for the elderly to excessive use of limitations and force. These complaints are some of the reasons why Member States are developing or changing regulations and legislation to ensure that there are standards that are sufficiently high.

It is not easy to assess the quality of the different types of long-term care provided. This is difficult for formal institutions, such as elderly or hospital homes, but it is even more complicated for informal conditions such as home ownership or friends / relatives' homes. OECD classifies criteria for assessing the quality of care provided are becoming more sophisticated and credible. However, in many Member States they are still at an early stage of development. They reflect factors such as providing help to informal carers, giving more choices to the patient, ensuring the capabilities of people working in the field of long-term care, and providing technologies that can help them in their tasks. It is difficult to assess the quality of care that people receive. [4]

3. Long-term sustainability

Funding for long-term care is regulated differently across the EU, reflecting differences in traditions and priorities. Four factors, however, affect:

- the long-term care schemes and population;

- the organization of the financing of social assistance in the country;

- the degree of private financial participation; and

- the division between public and private responsibilities in terms of long-term care.

General government programs can be funded in the following ways:

- Social security (Germany, Spain, Luxembourg);

- taxes (Scandinavian countries, Latvia);

- schemes with a condition of property status (Cyprus, United Kingdom); and

- Mixed funding systems combining resources from social security schemes and taxes and different budgets and institutions responsible for the provision and purchase of long-term care (Belgium, Greece, France).

CONCLUSION

The role of palliative care at the end of life is to relieve the suffering of patients and their families by the comprehensive assessment and treatment of physical, psychosocial, and spiritual symptoms patients' experience. As death

approaches, the symptom burden of a patient may worsen and require more aggressive palliation. As comfort measures intensify, so does the support provided to a dying patient's family. Once death has occurred, the role of palliative care focuses primarily on the support of the patient's family and bereavement.

National authorities are exploring different ways to address the expected growth in demand for long-term care. This will happen when the number of men and women of working age who can provide care decreases, while the number of dependent elderly people is increasing. In addition, the trend towards smaller families and the increase in the number of single parent families leads to a decrease in the total number of people who can provide informal care.

It is recognized that providing long-term care at home or in the residential environment is the preferred option for long-term care recipients of institutionalized care. To meet the increased demand, Member States will need to:

- cope with the expected reduction in qualified long-term care staff;

- develop a sustainable mix of public and private sources of funding;

- ensure effective coordination of the different long-term care systems; and

- Practice the principle of universal access to long-term care. [4]

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**STUDY OF THE EFFECT OF PHYSICAL THERAPY PROGRAM ON STRESS
REDUCTION THANKS TO SKIN CONDUCTIVITY MEASUREMENT**

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ABSTRACT

It is an undeniable fact that stress actually invades an essential part of our society. We consider it necessary to model the response of the Vegetative nervous system in stressful situations. Every human being disposes with different genetical skills in order to stand the power and the duration of different provocations. In recovery specialists' practice there are no devices designed to monitor stress indicators. In order to study the effect of physical therapy program on stress reduction we apply a skin conductivity measurement with a device called Mind-Reflection.

Key words: stress, modelling, response, device, monitoring

INTRODUCTION

The problem of occupational stress and the development of a burnout syndrome is essential for people with serving professions. Occupational stress affects health in a biological, social and psychological aspect (1).

In modern medicine, the use of high technology is becoming more and more popular. Physical therapy uses classic remedies such as Healing Massage, Physical Therapy and Healing Exercises. We find it imperative to enrich the arsenal of means by including the use of computer software designed to train the individual systems of the human organism. The field of action of Physical therapy should be expanded continuously. We consider it necessary to explore the possibilities of applying modern treatment methods to clients and patients subjected to stressful situations in order to prevent it. Undeniable fact is that stress conquers much of society. There must be no one who has not been in such a state. Each human individual has different genetic capabilities to stand the strength and duration of various irritations. In the practice of medical specialists dealing with stress testing and therapy, reading of the level of skin electro conductivity is widely accepted. In this publication, we will explore the working algorithm of the device Mind Divine-Reflection (MDR). It measures 8 times per second the rapid, small deviations in your skin's electrical resistance (called a galvanic skin response or even a psycho-galvanic reaction from English GSR – galvanic skin response). When the level

of psycho-physiological activation, stress, or excitement increases, the sympathetic part of the autonomic nervous system activates the sweat glands on the palms, which start to release more secretion and so the electrical resistance of the skin decreases (saline aqueous solution is a much better conductor of electrical current than pure water).

VERIM[®] LAB LIGHT shows the following parameters in real time:

- Skin conductivity measured in microsens
- Skin resistance, measured in kilosOms
- The relative change in skin resistance in% of its value at the beginning of the session.
- Relative local change of skin resistance within a time window of 2 seconds.

In particular, this function allows the identification of even the smallest fluctuations in the emotional state of the investigated person towards incentives present at the current moment (4).

In order to develop our own program to normalize the Response of the Autonomic Nervous System in a stressful situation we used whole body exercises, breathing exercises and stretching from the Yoga long-term tradition, the beneficial effect of yogic breathing is to calm the nervous system and hence it affects all organs and systems especially of the heart (3).

Yoga practices combine correct exercises (asanas), breathing (pranayama), relaxation, diet and positive thinking, and meditation (5). They are combined with elements of Tai-chi. In translation, "Tai" means "great" or "superb", and the word "chi" is something like "primary, basic". Tai-chi is often referred to as "superb primacy" (2). We have included Emotional Freedom Technique (EFT). EFT affects only the



fig.№1 Image of the In-Yang Concept

Complex movements from Chinese traditional gymnastics combined with the breathing phases (inhalation-retention-exhalation-retention) and skilful handling of mental energy are integrated into the exact place in the main special part of the kinesitherapeutic complex.

The Stretching Yoga concept, which relies on the generated effect of consistent posture application after stretching, contributes to the complete relaxation of our customers.

Exploration of autogenic training elements, a tried and tested method for relaxation of the whole body and the psyche, enables us to deliberately influence verbal commands and the use of isotonic transformed into isometric contractions for better subsequent relaxation. Based on our knowledge of the basic principles of kinesitherapy:

gradual, sequential, switching from lighter to heavier workload, systemic, consciousness, activity and individual approach, we arrange the therapeutic procedure and create appropriate timeframes for the preparatory, the primary and the final part.

The kinesitherapist has the necessary competencies to properly formulate his own kinesitherapeutic complex to reduce stress by integrating elements of different therapies from antiquity and present.

emotional problem, but when its intensity has been reduced, the physical problem also resolves (1). Believing in the righteousness of eastern wisdom and the In-Yan concept, which completely overlaps with the main task of kinesitherapy in psychiatric illnesses, balancing the excitement-bearing processes in the cerebral cortex.



fig.№2 Autogenous workout

MATERIALS AND METHODS

To run the MDR study properly, we use an algorithm that should follow the instruction manual. We connect it to our computer. The Windows system recognizes the device. The readiness to work is known when the green indicator lights up. The sensors are fixed to the fingers. The tested person sits comfortably, the device is started by briefly pressing the 'Start' button. Make sure that the client's hands are dry and clean. Place the metal parts on the finger surface. They must be secure, but not too tight. For cleaning use alcohol, cotton or a suitable fabric. Before making the measurement, make sure that the hand is in the correct position and comfort position. Do not touch metal sensors after starting the test. The hands should not move.

Factors that may lead to incorrect reading of metrics:

- Start measuring after short activity and walking. Relaxing in the seating position for 5 minutes.
- Beginning of the study immediately after passing from room or environment with temperature difference (heat-cold)
- Last feeding before the procedure should have been at least 30 minutes earlier.
- Smoking, alcohol, coffee and medication

We familiarize our customers with the instructions for conducting the study using the device the day before it is held. We made a study of 29 health workers at Spa-Hotel Primoretz, 6 women and 9 men aged 22 to 32 years for a period of three weeks in September. Prior to using our own kinesitherapeutic complex to reduce stress, we did a study with the device Mind Divine Reflection and we have interpreted two main indicators: The Level of skin conductivity and resistance to electricity. After training in proper implementation of the kinesitherapeutic complex.

Health workers under the guidance of a trained specialist-therapist executed complex activities with a total duration of 20-30 minutes three times a week. They are instructed to perform the self-study of the kinesitherapeutic program once we are sure that the methodological guidelines are followed. After the course of therapy, a positive change in the two indicators is visible. The level of skin conductivity after the procedure is reduced in men (fig.№3), and in women the results are also changed (fig.№4).

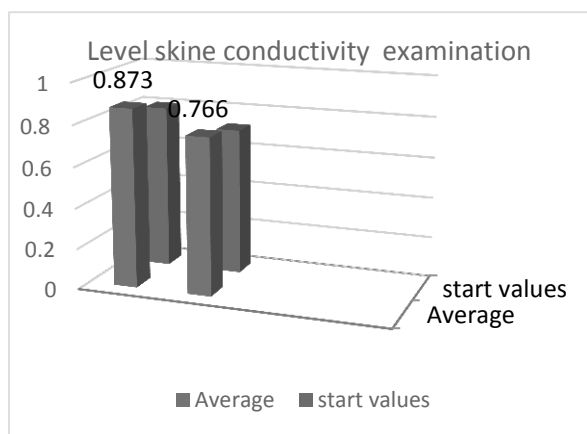


fig.№3 Level skin conductivity before and after the procedures – men

RESULTS AND DISCUSSION

After the study and training in the kinesitherapeutic complex to normalize the response of the ANS /Autonomic nervous system/ under stress situation, an essential improvement in the values of skin conduction and skin resistance levels is evident. We consider it necessary, in future, to work in a health team including psychologist, kinesitherapist, speech therapist and neurologist. Particular attention should be paid to even broader treatment to normalize the response of ANS to stressful situations, including recommendations for proper nutrition and herbal therapy.

A number of tests to determine the level of anxiety our customers shared about, should be added. This way, more attention will be paid to the cause of the development of stressful situations.

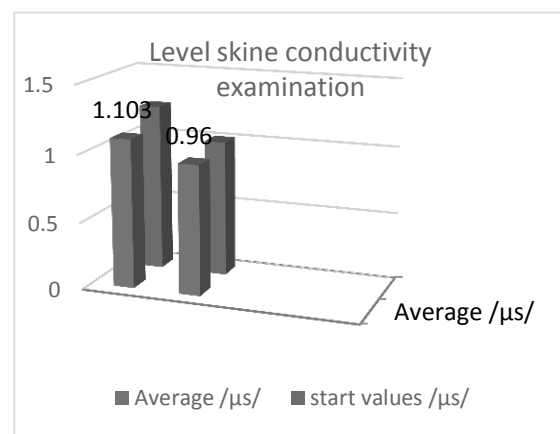


Fig.№4 Level skin conductivity examination before and after the procedure - women

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COMPLEX APPROACH TO ORGANIZATION AND IMPLEMENTATION OF GERIATRIC CARE

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ABSTRACT

The necessity of geriatric care application is conditioned by the specifics of the demographic structure in the Republic of Bulgaria. The high share of the elderly and older people in the country requires that health care for them should become a priority task of the National Health Strategy in a long-term plan.

In this article, the authors present different aspects of preparation, organization and implementation of geriatric care. The results indicated herein express the process of research performed by the authors in a two-year period. The successful conducting of the geriatric care is bound with the application of a complex approach consisting of the State legislative Policy, the created model of interinstitutional functioning relations, the health care specialists who have mastered quality knowledge and skills.

Key words: *complex approach, geriatric cares, students.*

INTRODUCTION

Achieving an equitable and sustainable health care system able to meet the moral need of all the levels of the society is a hard process due to different circumstances. Dramatic changes occurred in the demographic structure of the population, the increase of the health care costs and the reduction in the resources put serious challenges to the contemporary society. One of the most problematic groups among the risk ones of the population includes the elderly and older people. The difficulties related to provision of qualitative health care are associated with the heterogeneous combination of such cares, the health problems specificity and the diversification of the needs: health, social, psychological ones.

The actuality and the significance of the problem, related to the geriatric care services development, is bound with the trend toward an increase of the elderly and older people's share, on documentary method (normative documents and scientific research elaborations referred to the above mentioned problem in specialized literature sources have been studied and analyzed); the sociological one (questionnaire charts), the statistic methods (which data have been processed using a Microsoft Excel program and graphically represented); as well as a pedagogical experiment: a purposeful observation, a crea-

one hand, and to a provision of a quality of life and implementation of works enabling aging in activity.

The purpose of this study includes the conditions and the factors supporting the application of the complex approach to health care problems solving.

The object of this study includes the available legal framework (in national and international plan), as well as the respondents' knowledge, skills, attitudes, ideas concerning the necessity of the geriatric care services application.

The range of this study comprises 152 elderly and older people, 125 nurses, 103 students.

The subject of this study is the process of preparation and implementation of geriatric care services.

Materials and methods: the following methods and materials have been applied to: the creation of a team consisting of a health care lecturer, medical specialist and students on pre-graduation internship of Healthcare Services Field.

EXPERIMENT

The research process was carried out in 2017-2018, among 380 respondents. The experience in geriatric care services implementation in a number of European

countries has been studied and a comparative analysis has been performed with the experience gained in Bulgaria in geriatric care application. For that purpose, questionnaire charts have been prepared comprising questions differing in content and structure. The results from and the analysis related to them have been published in different reviews and presented to international forums [1], [2], [3], [4], [7].

The performed documentary research shows that good practices in integrated care services application are known in the international plan [13], [14], [15], [16], [19], [20], [21], [22]. The stress is pointed onto different fields, according to the health care and the social systems specifics in the States. In Germany, England (Great Britain) and Canada, the integration is oriented to the interaction between the primary medical assistance and the secondary care services. The purpose is to effect an improvement of the coordination among the different kinds of health care services giving prominence to the long-term care services. In Holland and Sweden, there is integration between the health care services and the cares at society level. A larger scale of services has been implemented by integration, the social services and the ones within nurses' society comprised. In the USA, Singapore and Japan, it is the integration between payers and providers that comes to the fore. It guarantees that the stimuli in the system encourage all of the healthcare providers in minimizing the costs. The analysis of the normative documents available in the Republic of Bulgaria (as a member of UNO and EU) shows that all the documents have been ratified and proves the fact that the synchronization of the legislation has been going on, according to the up-to-date standards for health care quality and safety of the elderly and older people. Strategies and programs have been elaborated and approved in our country, with the aim to guarantee and provide a worthy life for the third age people, creating a system of sustainable, effective and accessible cares. The National Health Strategy (2014-2020), according to the Regulations approved by the EU, the National Concept for Promotion of Active Ageing of the elderly people, elaborated in Bulgaria (2012-2030), the National Program for Prevention of Chronic Non-Communicable Diseases (2013-2020), the National Health Strategy for Long-Term Care and other strategic documents present the directions and measures guaranteeing a worthy life for the elderly people in a good state of health in Bulgaria [8], [9], [10], [11], [12].

Regardless of the efforts which have been made, it is still impossible to achieve congruence between the population needs and the implemented legal changes, and that has led to a strong separation between the health care and social policies. Serious challenges are: the uneven geographic distribution of the population and the possibilities for offering of a variety of cares and services in the different built-up areas (towns and villages), the insufficient number of well-grounded professionals and experts in the geriatric care field, as well as a highly restricted financial resource. A number of scientific researches on that problem have been published in the specialized literature sources, with the purpose to overcome the above mentioned deficits. P. Salchev has elaborated and offered a Balanced Model of Long-Term Coordinated Integrated Care [26]. The model of offering such kind of care requires that a Unified Coordination Centre should be available on a given territory or a social group, on the basis of different models of financing. Another author, G. Petrova, has offered a Model for Application of Integrated Care Services to Patients with Chronic Diseases. In that model, the stress is pointed onto the chronic diseases treatment through multidisciplinary care services provided by different medical specialists [5]. P. Stefanova has described a model of domicile geriatric care services implementation where the leading idea includes the individualization of the care services: to each user, as well as a complex assessment of the needs underlining the nurse's role in organizing adequate and permanent care services for elderly and sick people at home [6].

On the basis of the examined and analyzed contemporary theories, concepts, strategies and models, we offer a Model of Integrated Support and Assistance for elderly and older people in domestic environment, which would be able to overcome the discrepancy between the real needs of the society and the restricted financial and human resources. The elderly and older people are examined as divided into three main age groups. According to the classification made by the World Health Organization, people over sixty years are subdivided into: elderly people from 60 to 74 years, older people from 75 to 89 and centenarians over 90 and more years old. The leading idea of the afore indicated model in the implementation of the geriatric care includes individualization of care services after reporting of the bio-psycho-social aspects of health of each user and a complex assessment of needs where a

health promotion and disease prevention approach and a multidisciplinary one should be applied to, in the course of solving the complex problems related to elderly and older people. An important aspect of that same model is a formation of skills by the elderly and older people for an independent life style in domestic environment. [3].

In the course of care-giving of elderly and older people, ethical dilemmas often arise as a challenge in front of the health care professionals: such dilemmas are related to observation of the fundamental bioethical principles: human dignity and rights; respect for human vulnerability and personal integrity; equality, justice and impartiality; non-admission either of discrimination or stigma and others. In relation to that, the opinions of the students in different medical specialties have been investigated. The students have studied subjects as following: *Medical Ethics and Deontology, Social and Health Legislation* and have participated in clinical and educational practice related to elderly and older people's treatment and care-giving. The study has been conducted among the students of Health Care professional field. Of 103 investigated students of 2nd, 3rd and 4th courses, 74 had Nurse (Nursing) specialty /Educational-Qualification Degree of Bachelor/ and 29 ones, Rehabilitation therapist /Educational-Qualification Degree of Professional Bachelor/, i.e.the 2nd and 3rd course students. Primary course students have not been investigated taking into consideration their insufficient theoretical preparation and scarce practical experience in health care giving.

The answers to the questions of the investigation, referred to keeping the elderly and older people's rights to access and application to qualitative health care, during the observations made on the students, have shown rather negative results. The "Yes" answers to the question: *"Do you consider that elderly and older people's rights to appropriate health care application are observed?"* have been given by 15,53% only of the respondents while the "No" answers have been expressed by 84,47% ones /S.Fig.1/:

The data collected from the results have outlined the students' opinion about the question: *"Do you consider that elderly and older people have access to qualitative health care?"* and show predominated answers as *"Hard access"*: by 37,9% of the Rehabilitation Therapists and 45,9% by the Nurses, and *"None"*, by 45,9 %

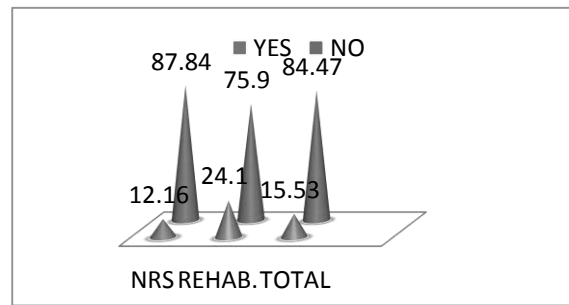


Fig. 1. Observation of older people's rights

and 39,4%, respectively. Some 12,6% only of the students have expressed their opinion that older people do have access to qualitative health care (S. Fig. 2.):

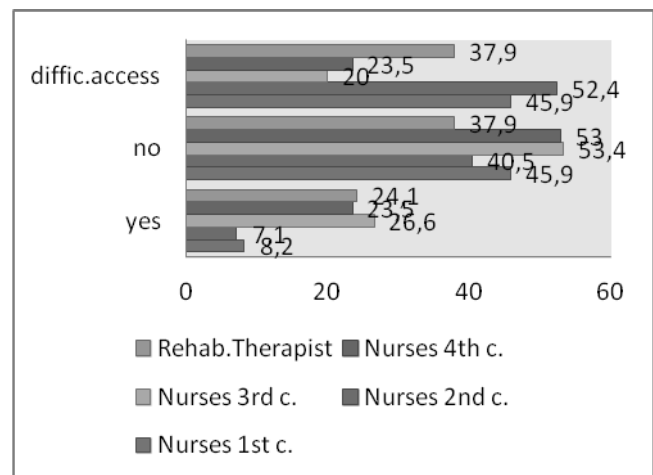


Fig. 2. Access of elderly and older people to quality health cares

The analysis of the results obtained from the purposeful observation on the students of hospital and outpatient assistance has categorically shown that the approved ethical standards for a guaranteed access to qualitative care is hardered and infringes the elderly and older people's rights to certainty and safety.

The efficient application of geriatric care is bound with personal responsibility and people's participation in strengthening their health. That is why it becomes necessary to provide for a permanent improvement of their health informedness and skills for coping with chronic illnesses in domestic environment. An anonymous inquiry has been carried out on 75 (55,6%) respondents living in towns and 60 (44,4%) ones living in villages. There have been 24,44% only of all the inquired people who live in built-up-areas of more than 50 000 people population. The division by sex has shown 29,6% (40 inquired) men

and 70,4 (95 inquired) women. The greatest percent (50%) has resulted of the people between 66-70 years old; 24% - of the people between 71-75, 15% between 60-65 years old and the rest 1% for ones over 76 years. The answers given to the question: "Do you receive any written or oral information by your physician or nurse, which is related to care: nutrition, hygienic care, range of movement, drugs (medicines) taking and other, appropriate for your health problems?" have been divided almost in half. 51% of the respondents have been frequently receiving information while 49% have indicated to be rarely or never provided of any competent information. The answers given to the questions are shown in more details in Fig. 3, as follows:

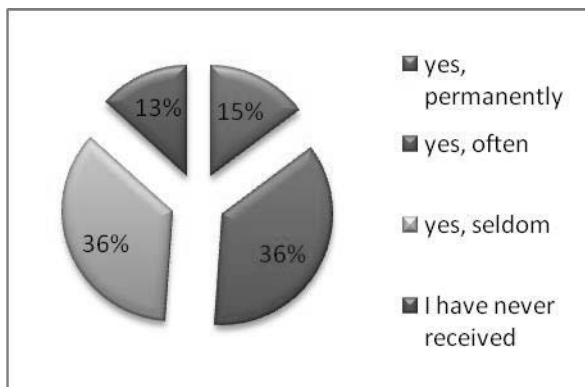


Fig. 3. Health informedness on cares in clinical diseases

Correlative to the opinion expressed by the elderly people are the results obtained from the study carried out with 125 nurses working in individual and group practices at the Primary Medical Assistance Outpatient's Departments (PMOD) on the territory of the Region of Burgas, in 13 Municipalities. Nurse's participation in health-educational lectures or another forms of training, referred to patients or their encirclement. It becomes evident from the results that a systematic course of training has been carried out with 31,20% only of the respondents. And it is really alarming the assertion given by 9,60% of health specialists that the above mentioned activity is not within the range of their duties (S. Fig.4):

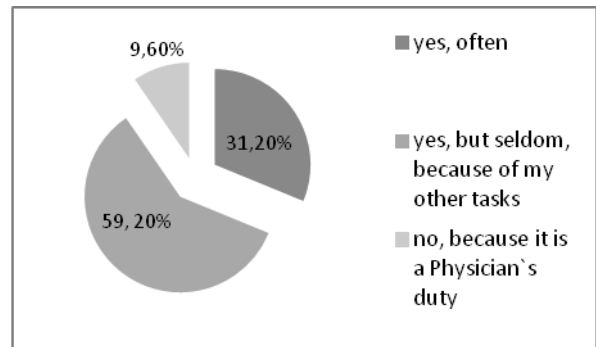


Fig. 4. Health-education activities performing by the nurse

A significant condition for the improvement of nurses' competencies is their insertion into the postgraduate education system in the field of geriatric care. The data, obtained from the investigation, have shown that 14,40% of nurses only have given a categorical answer: "Yes, I wish to go on specializing". The wish expressed by 20,8% of the inquired is associated with the condition: "Yes, if it is required for the workplace". 32,80% of the nurses have pointed out that "I would specialize in other care health fields". Some 20% of the inquired have firmly expressed: "I have no wish to do it" while other 12% ones have given their answer that: "I am not familiar with the forms of qualification improvement". Such a lack of motivation among almost a third of the inquired persons could be explained by the age composition of some respondents who are close to retirement in the forthcoming five years. Other reasons causing demotivation among the nurses are: missing financial stimuli and highly restricted functions in the course of implementation of professional activities and provision of primary medical assistance [2].

In order to examine the students' attitude to work with older people, the following question has been put to: "Which contingent of people would you like to look after, according to people's age characteristics?"

6,3% of the future specialists only have shared they wish to give health care to elderly and older people (S. Fig.5):

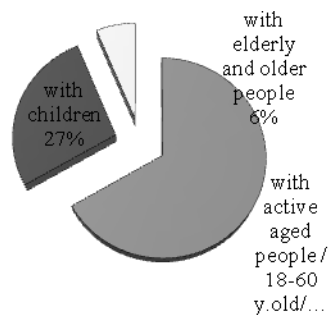


Fig. 5. Wish expressed by the students to work with elderly and older people

So has the future specialist` wish examined for improvement and professional development in geriatric care field. The results have shown that 41,4% of the students rehabilitation therapists and 45,6% of students nurses have been still missing enough orientation to their future specialization, which could be explained taking into consideration the phase of their training and the lack of professional experience. There are some 29,1% of the nurses and 41,4% of the rehabilitation therapists who have categorically expressed they have no wish to develop their knowledge and skills in health care field. The students of Nursing (Nurse) specialty who should specialize geriatric care-giving are 25,3 (S. Fig.6):

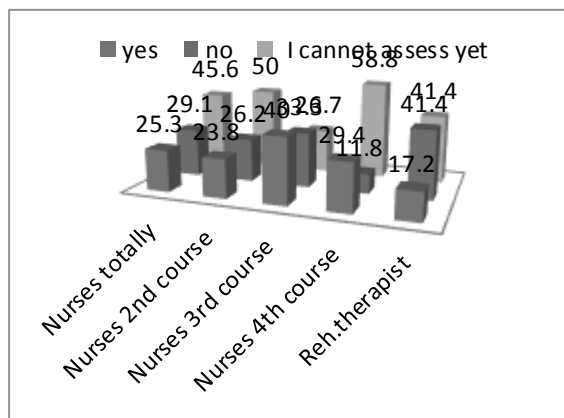


Fig. 6. Wish for a Post-Graduate Training in Geriatric Care

The results obtained from the performed investigation have shown that challenges which are to be faced in the training course of the Nursing (Nurse) specialty students are far from being considered few. There is an urgent need of organizing an educational process able to prepare health specialists having the required competencies, thus responding to the increased public need of geriatric care services implementation.

It is the health care lecturer who takes the leading role in planning, organizing and imple-

menting such a pedagogical activity through which a student should be oriented, assisted and motivated, in correspondence of his/ her best interests and individual possibilities in the process of study, to become aware of social needs and his/ her own place in the field of care-giving to elderly and older people.

Knowledge of the substantial characteristics of the interactive methods and their insertion into the students` training, by the lecturer, is a factor which contributes to a greater efficiency of the educational process. The use of the interactive methods gives the opportunity to the student to take up an active position. The application of the discussion methods in seminars and exercises, the solving of a casus, the insertion of the concrete situation method into the educational process offer an opportunity to the students to consolidate and enlarge their knowledge of aging, elderly and older people, to gain experience for autonomous identification and solution of problems, to represent different approaches and interpretations. In that process, the lecturer takes role of moderator who stimulates original thinking process, good argumentations and provokes expressions of different opinions and points of view.

The students` participation in research projects implementation helps them form intellectual autonomy, critical thinking, as well as give them a possibility to realize ideas for their own purposes. Discussion and situation methods are applied in the course of preparation for conducting the` practical training of the students in public medico-social structures as Retirement Home (Older People`s Home), Domiciliary Care, as well as in Medical Institutions of Outpatient Assistance as Individual and Group Practices of Outpatient Care.

Students` engaging in out-auditory activities is a part of the geriatric care training. It is another possibility for a practical application of the absorbed knowledge and skills into the out-university environment. Under a health care lecturer`s guidance, the students conduct physical, anthropometric exams and some express laboratory tests (arterial blood pressure, pulse, index of body mass, abdominal circumference, blood sugar, 3-glycerides); individual discussions are carried out with an elderly man. Students` participation in promotional and preventive activities is organized and prepared not only in Retirement Homes, but also in Senior Men`s Clubs, within the social community. Interdisciplinary teams are formed by volunteers where students of the

health and social care field join to take part in. Such students actively participate in geriatric care-giving implementation under their lecturers' guidance (S. Fig.7):



Fig. 7. Model of a Volunteer's Team for geriatric care

RESULTS AND DISCUSSION

The performed research process and the analysis made of the obtained results afford the opportunity to delineate the existing problems in the geriatric care-giving field.

In Bulgaria, regardless of the approved strategies, the primary medical assistance is scarcely developed and poorly assessed by patients and medical specialists.

The anonymous inquiry carried out among the elderly and older people has pointed to the necessity of the integrated care organization and application. On the basis of the performed investigation, the authors have created and offered a Model of Integrated Support and Assistance for Elderly and Older People in Domestic Environment. The availability of such a model helps to overcome the deficit of adequate geriatric care by means of alternative contemporary approaches to the organization and provision of qualitative health and social care. The stress has been put on a creation of possibilities for older people to increase their personal responsibility to health, self-assistance and social support. The creation and implementation of the geriatric care models should be led by the variety and complexity of the problems, the degree of autonomy, the users' needs and requirements, as well as by the standards for quality of health care and services. The financial resource should be balanced and well managed. The realization of an entire integrated model shall give the opportunity for a provision of accessible, permanent, sustainable and com-

plex qualitative health-social care to elderly and older people.

It is the nurses' high quality preparation that attaches significant importance to the offered geriatric care. Nurses are expected to possess specific competencies for work with a social group consisting of older and elderly people. Nurses' knowledge and competencies predetermine to a great extent the character of the processes for a complex care provision to elderly and older people, in order to overcome their health, social and psychological isolation.

With regard to what previously reported, there is a need of such an educational process which offers quality of knowledge and affirms students' skills for care-giving, establishes conditions for creative thinking being able to form to the optimal extent adaptation capacities, behavior models and rules for human attitude to the ways of solving health problems related to elderly and older people and their families.

Another standing out and significant condition referred to the complex approach to geriatric care is a permanent trend to create opportunities (at the Universities and by the Employer/s/) in order to proceed further training in geriatric care field.

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OBESITY IN CHILDHOOD THROUGH THE EYES OF THE GP

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ABSTRACT

The high rates of childhood obesity make it a worldwide pandemic. Significant factors - biological, ecological, social and economical, contribute to its influence on health and quality of life. Research on the opinion of general practitioners regarding overweightness and obesity in children in preschool ages allows us to analyze to state of the problem in Burgas and its region. Identifying the possible measures for prevention of the rising tendency of high rates of obesity will allow us to improve the health of the children.

Key words: *childhood obesity, preschool age, general practitioner*

INTRODUCTION

Childhood obesity has turned into a worldwide epidemic. During the last two decades, the spread of childhood obesity has risen in many countries. Across the world, 42% of the adults and around one fifth of children are overweight or obese.

“Obesity” could be defined as the buildup of and the storage of excess body fat, while “overweight” would be defined as above the recommended weight standart. Childhood obesity could be viewed as a state, which causes significant health issues during childhood.

Series of research show that the biological, ecological, behavioural, social and economic factors and the complex interaction between them have contributed to the rising global epidemic of obesity.

It becomes more and more obvious, that factors from early ages of life influence the occurrence and severity of childhood obesity. The research on these factors has a tendency to stay in areas, characterized with disciplinary and organizational level and age range of the first 1-2 years and preschool and early school ages.

The unhealthy model of eating and low physical activity are an important factor for the rapid increase in rates of obesity. This is one of the serious world health problems. In the second National Plan of action “Foods and Eating” activities related protection of the health and promotion of the healthy eating habits in children and adolescents were developed. This shows a

high engagement and interest, and strong health politics [1].

Because no criteria for determining childhood obesity and determining whether excess body weight has been built up have been established, the BMI (body mass index) is used in epidemiological as well as clinical cases. The duration of obesity during childhood is of highest importance for the prevention of its influence of the long-term health and quality of life.

The traditional approaches for control of overweightness and obesity are with poor efficiency and that is why the current best strategy is through conducting assessments of the risks of a future obesity.

Assessing the risk from a future obesity or overweightness in newborns can be grounds for goal-oriented preventive activities in the first months of the life of a child. Prevention must start as soon as possible after childbirth. A series of research shows a strong correlation between early increase in body weight in a newborn and its weight during childhood.

In many countries, kids in preschool ages and kids in school have already been burdened with the high rates of overweightness and obesity.

The reasons for obesity in kids include genetic, biological, psychosocial behavioral and cultural factors. Determining the factors, which influence obesity in early childhood is of high importance. These factors include the characteristics of the child such as gender, and age, weight during childbirth, parental and family characteristics, monitoring of the

childhood activity and eating habits, as well as the parents' weight status and physical activity.

In her publication G. Terzieva points out that "51% of the researched population is strongly deprived of physical activity. Kids as early as 6 years old, or even younger, spend on average two hours in front of the TV or equivalent every day. Teenagers spend over 4 hours daily" [2]. This shows that one of the causes of the emergence of obesity is precisely lack of physical activity in early childhood.

Primary key factor in building healthy habits in the child is the family. This fact highlights the importance of the directing efforts in prevention of obesity and not allowing any slips in the right habits of eating and exercising, and that these efforts must begin as soon as early childhood. Research literature shows lack of clarity with regards to new models for prevention of obesity. International research shows that GPs play a significant role.

The problem with overweightness in children in early childhood ages and preschool ages determines the importance of the research and allowed us to formulate the **goal of the research**: to research the opinion of the general practitioners about obesity in early childhood ages.

The object of the research is the causes of obesity, the possible ways to resolve the problem and the prevention of obesity in early childhood ages.

The scope of the research is 31 general practitioners with individual medical practice, working on the territory of the towns of Aytos, Kameno and Burgas.

The methods of the research: a literature overview on the problem, method of documenting, anonymous polls

RESULTS AND DISCUSSION

To research the opinion of GPs regarding the causes, complication and possibilities for resolving the problem of overweightness or obesity in children a poll was conducted. A questionnaire with 10 questions was prepared. The research was conducted in the period 2016-2017.

The analysis of the data from the poll of the 30 GPs, working on the territory of Burgas and Aytos reveals that in their practice they have at least one overweight or obese child. A portion of the GPs (16.67%) share their opinion that there is no tendency in the rise of children with abnormal weight. The rest of the GPs - 83.33% - are

adamant that this happens more and more (see fig. 1):

Fig.1: Tendency in the rates of obesity in children

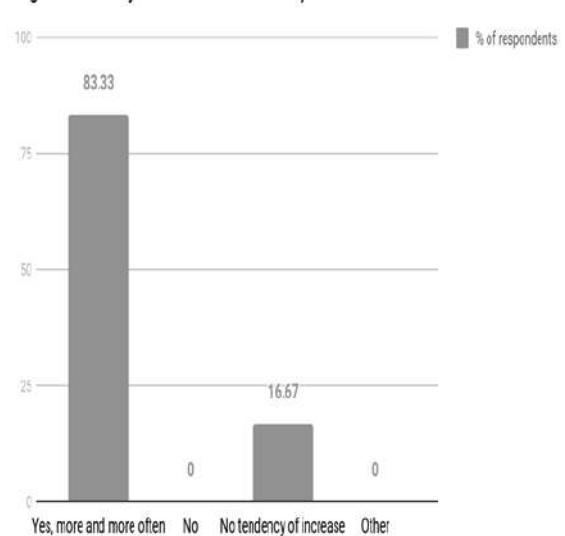


Fig.1. Tendency in the rates of obesity in children

The results from a medical check of 58 children were analyzed. The check was conducted in 2016 from a GP, and the children from a preschool age, from Kameno, in the municipality of Burgas. The BMI was used in determining the body weight. The sample consists of 36 boys and 22 girls.

The results show that 16 of the children are overweight, of which 10 are boys (27.78%) and 6 are girls (27.27%). Of them 6 children were obese - 2 boys - 5.56% and 4 girls - 18.86%.

Taking into account that eating habits and physical activity determine the health and are a necessary condition for providing optimal growth and development of children, age in which habits are formed, and taking into account the results of the poll, GPs suggest that activities oriented towards the parents in order to change their behavior in regards to the eating habits of their child.

The next question clarifies what the distribution of the overweight children by age is. Among overweight children 16.67% are 7 years or older. The highest portion with a change in body weight is children in the 5-6 years age range, that is, children in preschool age. Obesity is higher in children around 5 years of age, but no increase is observed in the age range before 5 years. In summation of the data it may be pointed out, that regardless of the low number of children (in the conducted research) in early age, the rates of spread of obesity in children in preschool age (see fig. 2):

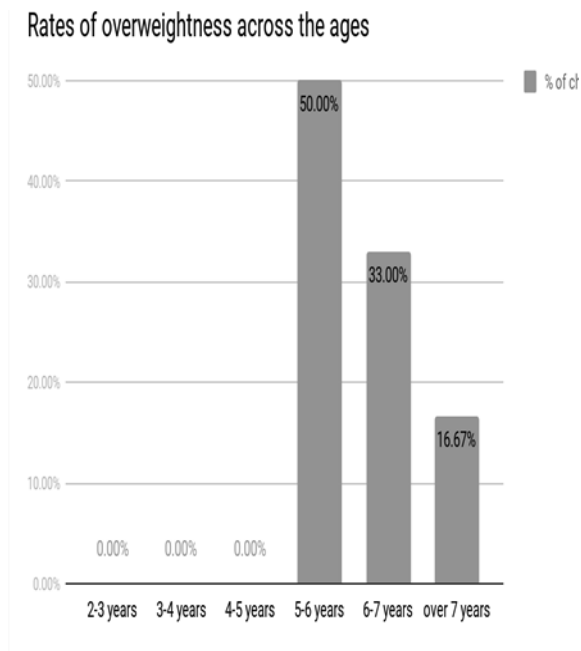


Fig. 2. Rates of overweightness across the ages

In the conducted research an interesting thing was to establish what the reasons for the obesity in children are. According to 19.35% of the inquired GPs, eating without a regimen is an important premise in the change of weight in children. 12.90% of the respondents claim that the motor mode of children plays a negative role on the health of the children. GPs point out that a not-insignificant portion of children are with expressed emotional states (also called stress states) - 9.68%, as well as kids, which haven't been breastfed - 6.45%, which also plays a negative role on the weight of children. GPs point more evenly - 25.81% - that eating unhealthy food and hereditary factors are primary in the development of overweightness and obesity (see fig. 3).

The distribution of children in regards to the level of obesity was researched. 20% of the GPs determine overweightness of the children as 3rd degree - the body mass of the child is 50-99% above the norm. It is entirely logical to ask the next question: what kind of complication would childhood obesity lead to? 40% of the doctors determine that there is a high risk of developing a series of illnesses without specifying concrete consequences. Other 30% of the doctors state problems with the digestive system. For 20% of the doctors, obesity plays a negative effect on the bone structure of children. 10% of the doctors state that abnormal weight influences the sleep patterns of the children (see fig. 4).

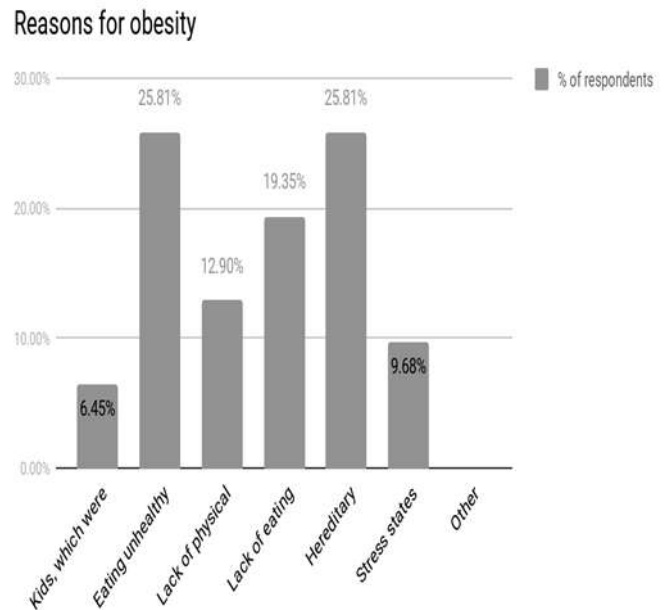


Fig.3. Reasons for obesity

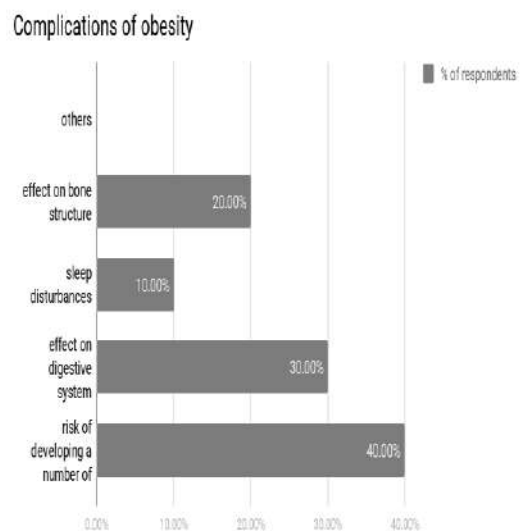


Fig. 4. Complications of obesity

The influence of abnormal weight on the psychological health of the kids was researched. GPs clearly state their opinion that regardless of the upbringing of the child, obesity influences the child's self-image and self-assessment

According to 33% of the doctors, kids with obesity are 'branded' by the rest of the children. 30% of the doctors say that obese children have a lack of confidence.

Childhood obesity is one of the most serious problems which our society faces right now. It is related to a plethora of different chronic illnesses, psycho-social consequences, as well as significant expenses for health. That is why GPs

were asked to assess whether it is expensive to diagnose and treat overweight kids.

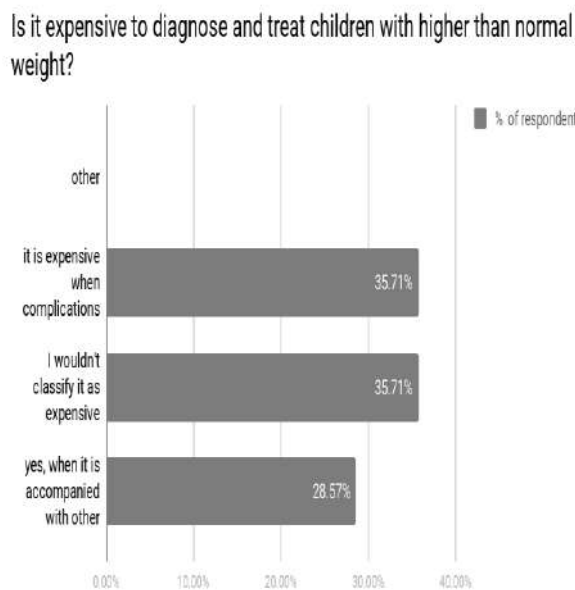


Fig. 5. Is it expensive to diagnose and treat children with higher than normal weight?

The respondents - 35.71% point out, that expenses are high, whenever complications have developed, that is - obesity is evident. It is interesting that the same percent - 35.71% of the respondents classify it as not costing too much. (see fig.5):

Due to the high degree of spread of overweightness and obesity in kids in early childhood, for the successful prevention of the problem, it is necessary for the problem to be classified as a significant priority in our health politics. The participation of parents is of decisive value for the prevention of obesity. They play an important role in modeling the healthy eating habits in their children. If the parents have enough awareness about the factors, which contribute to preventing their children from gaining abnormal weight or becoming obese, they could work effectively with GPs for resolving the problem.

Unfortunately, series of research show that parents don't seek out help from medical specialists, because they can't recognize the divergences of their child's weight as a health is necessary to conduct preventative measures by pediatricians and GPs, which should be all-encompassing and intensive, and should be oriented towards improving the eating habits of the child. Taking into account the results of studies, and the high rates of overweight children

problem. As a result, they don't seek treatment and are not concerned with the state of their child. This fact is influenced by the level of education and awareness of the parents. Low education in the mother is related with the possibility of incorrect classification of the child's weight as normal and healthy.

The research allowed us to determine the understanding of GPs about the necessity of prevention of overweightness and obesity in children. According to 55.56% of GPs it is necessary for the parents to build a healthy eating regimen for their kids. 55.56% think that teachers must be aware of the problem. 37.04% of the respondents point out that it's necessary to keep a constant monitoring of the quality of food - 7.41% (see fig. 6):

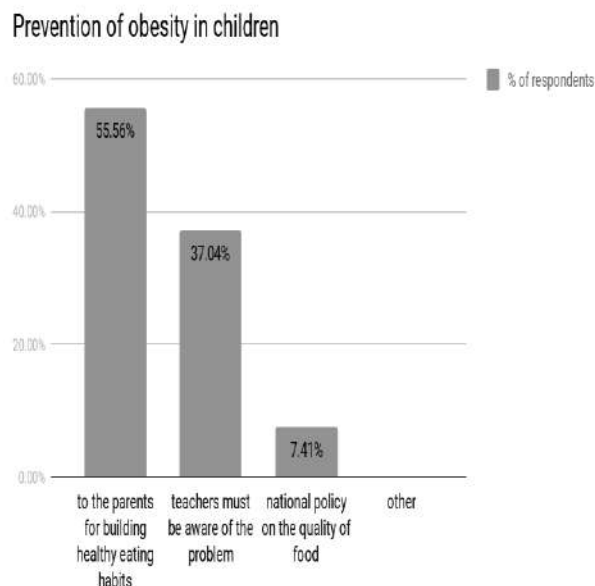


Fig.6. Prevention of obesity in children

CONCLUSION

Healthy eating of children and adolescents should be a priority in the national health policy of each country and it is related with preserving the societal health. Correspondence between GPs, nurses, parents and teachers would be of decisive importance for resolving the problem. It

it is necessary to follow-up on the following recommendations:

1. conducting prevention, guaranteeing effective approach for resolving the problem of childhood obesity and overweightness
2. to educate quality health specialists, who will give competent and coherent health

information about the severity to health of abnormal weight

3. monitoring and assessment of children's habits

4. check-ups and prophylaxis of obesity and prevention of complications in the health of the child with abnormal weight

5. to establish a permanent control over the quality of food.

In conclusion, the increase in body weight in children is an unfavourable tendency, and this could mean that a long-term model for prevention must be established.

The study is in accordance with **an internal university project (НИХ-№ 390/2017)** on the topic: "Developing of the competencies in students from the degree „Nurse” for the prevention of obesity in children in early school age”.

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