

**OPINION**  
**of dissertation**  
**for the award of the degree of Doctor of Education and Science**

**Scientific area:** 4. Natural Sciences  
**Professional field:** 4.4. Науки за земята  
**Scientific specialty:** Geography of countries – Regional and political geography  
**Developed in:** SU „St. Kliment Ohridski“  
Faculty of Geology and Geography  
Department of Regional and Political Geography  
**Title:** Migration processes and problems of socio-economic development in Karlovo after the Liberation  
**Dissenter:** Penka Lyubomirova Pisacheva

by Assoc. Prof. Dr. Ivaylo Lyubomirov Vladev  
Shumen University „Bishop Konstantin Preslavski“

(Member of the scientific jury approved by Order No. RD-38-91/20. 02. 2023 of the Rector of Sofia University "St. Kliment Ohridski")

**1. Data about the PhD student**

Penka Pisacheva was born in 1976 in the town of. She was born in 1976 in Karlovo. In the period 1995 - 2000 she studied at the Master's degree in Geography at Sofia University „St. She graduated in 2000 with the qualification „geographer, teacher of geography and economics in secondary school“. Since 2001 she has been a teacher of geography and economics at Sofia University. She is a teacher of Geography and Geography in Sofia. She is a teacher at Karlovo. Currently she is a senior teacher. She speaks English well and has good computer skills and competences. She has participated in various trainings, such as working with a platform for remote verification of test forms, innovative school - why and how to create it, industrial relations, prevention of negative social phenomena of our time.

**2. Data for the PhD**

The training for the acquisition of the educational and scientific degree „Doctor“ is carried out according to the doctoral programme accredited by the National Agency for Evaluation and Accreditation. The PhD student is enrolled in a full-time form of study for a period of

three years in the scientific specialty „Geography of Countries (Regional and Political Geography)“ at the Department of „Regional and Political Geography“ on the basis of order № RD 20-142/18.01.2019. Prof. Dr. Marin Rahnev Rusev was appointed as the scientific supervisor. On 01.02.2022. Penka Pisacheva was dismissed with the right to defence on the basis of Order No. RD 20-447/17.02.2022.

The dissertation was discussed and directed for defense at an extended meeting of the Department of Regional and Political Geography at the Sofia University. Kliment Ohridski" held on 31.01.2023. No procedural violations were committed during the dissertation realization.

### **3. Dissertation and abstract data**

The dissertation is developed in accordance with the requirements of Chapter II (Section III) - Conditions and Procedure for the Acquisition of the Degree of Doctor of Education and Science of the Regulations for the Conditions and Procedure for the Acquisition of Scientific Degrees and Academic Positions at Sofia University "St. Kliment Ohridski", supplemented and amended by the decision of the Academic Council of 26.05.2021 by Protocol No. 9 on the basis of Art. 21, par. 2 of the Law on Higher Education. The research interest is focused on the migration processes and socio-economic development of the town. Karlovo and its adjacent territories from 1878 to the present day. From the point of view of the established socio-economic practice, the topic is topical and dissertable. I accept the arguments presented in the thesis that the analysis of various development indicators such as spatial, natural resource, economic and scientific-technical, demographic potential, demographic and economic density, degree of urbanization, etc. determine the relevance of the development. I do not accept the opinion that the names „Karlovo“ or „Karlovo region“ can be used as synonyms of Karlovo municipality and Karlovo, which are defined as the main object of the research.

In the introduction of the dissertation the doctoral candidate justifiably presents the significance of the considered issues. The aim and the subject of the research are defined. The proposed scientific and research methods are appropriate for the realization of the main aim and objectives of the dissertation research.

The dissertation is presented in a form and volume corresponding to the requirements of the teaching department and contains: title page; table of contents; list of abbreviations used; introduction; statement in four chapters; conclusion and scientific contributions; list of references used; appendices. The work has a volume of 295 pages, of which 232 text, 95 figures, 44 tables and 22 annexes. 274 references are used, of which 38 are in Latin.

In the first chapter, which has a length of 45 pages, the theoretical and methodological foundations of the study are clarified. The chapter itself contains two sub-chapters in which the main indicators of the degree of socio-economic development and migration are analysed. It can be noted that the theoretical construction has its good foundation and is quite logical for this type of study, as natural-ecological, productive-economic and socio-demographic criteria, indicators and indicators and their role in sustainable demographic and economic development are discussed in theoretical aspect. In the case of migration as an indicator of regional development, the causal links and influences and the statistical-methodological aspects in their study are pointed out.

In the second chapter with a length of 35 pages a general geographical description of Karlovo and its adjacent territories until the Liberation is made. It is mainly descriptive and illustrative, presenting the components of the natural environment, the settlement and architectural development in antiquity, the early Middle Ages and the period of Ottoman rule. It would be appropriate and correct to refer to point 2.3.2. Population movement and ethno-social structure should be entitled „Population numbers, dynamics and structure“. One cannot talk about ethno-social structure but about ethno-linguistic and confessional (religious), which are part of the socio-economic group structures of the population. Moreover, in Tab. 3 (p. 76) the data from the Ottoman registers are about the religious affiliation of the population. The economic assessment of the socio-economic processes in Karlovo and its immediate spatial surroundings during the Ottoman rule is made.

The third chapter (66 pages) represents an important step in the research plan because it is devoted to the formation of the image of Karlovo as an economic and administrative-political centre from the Liberation until 1989. It is not clear why in point 3.1. Socio-economic development and productive specialisation in Tab. 7. and Fig. 13. (p. 92) data on population changes in Karlovo are presented (their positioning should be in section 3.3. Population movement), with data also present after 1989 until 2021. The socio-economic development of the study area is divided into two periods: from the Liberation to the end of World War II and from 1944 to 1989. In section 3.3. Population Movement and Structure, the indicator of population growth rate is not used to establish the rate of population change in Karlovo County/Village System/Municipality for the period 1878 - 1989, but only the change in population is indicated and it is found that the population is growing but at a slower rate.

The logical sequence in the analysis of population structure is severely disturbed, with ethnicity estimated first (for 1885 only, between 1887 and 1934), followed by natural increase, birth and death rates by religion (1903-1923), sex structure (1920, 1926 and 1965-1990),

marriage structure, education structure (literacy by religion and sex 1900-1926) by type of education and by locality in 1991. The following is a brief analysis of the mechanical population growth in the towns of Karlovo municipality (settled and displaced in 1985-1990), daily work trips, age structure according to work opportunities (1965-1990), occupational structure (1905 and 1910 and for the period 1905-1985), degree of urbanization (1965-1990), average population density in 1985, population growth (in absolute numbers) of the municipality of Karlovo by settlement (for the period 1986-1992) and from one census to another (1966-1992).

In the fourth chapter, which is the largest in volume (71 pages), an analysis of the socio-economic trends and problems in the development of Karlovo Municipality is carried out. The dissertation examines general and regional problems from a geographical, demographic and managerial point of view. Overcoming the negative trends in economic, political and demographic processes has always been a constant task to be solved by the governing bodies of the state and science. A large volume of statistical information on the population change and the average age of the municipality of Karlovo and the town of Karlovo has been processed. However, it is not clear how the doctoral student made a forecast until 2035 and what methodology she applied (Fig. 64 and Appendix 11). Through the compiled geographical passport of the municipality of Karlovo (Table 30, p. 175) the PhD student shows that she can analyze and interpret the empirical material. Various graphic and cartographic methods were used to visualise the processes.

When analysing the structure of the settlement network, Appendix 17 needs to be supplemented with a list of settlements and their classification by number of inhabitants. Since Chapter IV analyses the socio-economic transition after 1989 and the contemporary demographic and cultural-political aspects, it is necessary to include in Table 42, p. 215 the years 1992 and 2001, when there was a population census in the Republic of Bulgaria, in addition to the daily labour migrations.

In the analysis of migrations on the territory of the municipality of Karlovo (Fig. 90), in addition to settled, displaced and mechanical growth (in number), the indicators of intensity of settlements, intensity of displacements and coefficient of intensity of mechanical growth can also be used. The spatial changes by settlements for the period 1992 - 2021 will show different intensities and will be related to the changes in the social and economic situation in the country, which lead to the manifestation of new conditions and factors shaping the migratory behaviour on the territory of the municipality of Karlovo. At the end of the chapter are the results of the author's survey conducted among the residents of the municipalities of

Karlovo and Sopot in 2021. The main conclusions, results and contributions are highlighted in the conclusion.

The text of the dissertation research is richly illustrated, with 95 figures and 44 tables. There are 22 appendices which complement and elaborate the main text.

The abstract consists of 46 pages of text and gives a clear picture of the content of the dissertation, the main aim, objectives and methods of research used. It is written in accordance with the requirements and reflects the main results in the dissertation.

#### **4. Publications and participation in scientific forums**

The PhD student has indicated only one publication (co-authored), which was published in the Yearbook of Sofia University with a volume of 33 pages. It is related to the dissertation topic and realizes part of the dissertation research results. I think it is extremely insufficient and in accordance with the national requirements for the Ph.D. in the scientific field 4. Natural Sciences, the application of a single publication. Participations in scientific forums are also not indicated.

#### **5. Scientific contributions**

The scientific contributions that are formulated in the author's abstract are five. Of these I accept *the third*: „A geographical passport of the municipality of Karlovo has been created as a basis for the analysis and assessment of its current state in terms of leading indicators“ and *the fourth*: „The socio-economic and demographic development of the city of Karlovo and the municipality and their links with the migration attitudes of the people in different periods have been studied“.

I accept the first contribution with a degree of reservation. The second contribution is essentially not a contribution, but an analysis of the development of Karlovo as a municipal centre, without a complex result. The public opinion survey conducted is the most commonly used method of data collection and research and cannot be considered a contribution. Considerable empirical material has been processed and analysed using a variety of literature sources.

As a contributing point of *practical-applied importance* it can be noted that an attempt has been made to use the synthetic method - geographical passport as an alternative to the coefficients/indexes traditionally used in socio-economic geography. From a scientific geographic point of view, the specifics of the socio-economic and demographic development of the town of Karlovo and the municipality, forming the migratory attitudes of people in different periods, have been revealed.

#### **6. Critical notes**

As with any human creation, a number of criticisms can be levelled at the thesis. In practice, we have the author's achievements, which are more in the nature of recommendations and guidelines for future research. Already when formulating the research plan, the doctoral candidate has focused mostly on the overview character and not enough on the applied aspects of her research. This greatly limits him in both his theoretical analysis and his practical approach. Chapters three and four are unnecessarily lengthy. The analysis done could have been more focused on the topic of the thesis.

Some remarks can be made to the thesis:

- It is not stated how the proposed methods were selected;
- no critical assessment of the available demographic and socio-economic information by locality is made;
- J. Webb's approach to characterising the structure of population growth/decline in regional terms is not given;
- some of the chapters lack analytical conclusions;
- one part of the annexes (No. 12, 16, 17, 21, etc.) is used from the Integrated Development Plan of the Municipality of Karlovo 2021-2027;
- a quantified SWOT-analysis, which quantifies the identified strengths, weaknesses, opportunities and threats and ranks them in order of importance, has not been applied.

We would like to ask the author the following clarifying questions:

1. What is the main object of the research and which are the settlements that gravitate towards it? How can we define the delimitation of this territory?
2. If a quantified SWOT-analysis of the municipality of Karlovo is made, in which position will it fall and what kind of development strategy (aggressive, diversification, protection or recovery) will be applied?
3. What specific measures are needed to overcome the negative demographic trends in the study area?

## **7. Conclusion**

From the analysis of the development I conclude that the dissertation does not possess the necessary scientific and applied results of a contributory nature. On this basis, I do not propose to the esteemed jury and do not vote positively to award Penka Lyubomirova Pisacheva the educational and scientific degree of "DOCTOR".

03.05.2023

Prepared the opinion:

Shumen

(Assoc. Prof. Dr. Ivaylo Vladev)