

REVIEW

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Regarding: public defense of a dissertation for the acquisition of the educational and scientific degree “doctor” in the professional field 4.4 Earth Sciences (Geography of Recreation and Tourism)

Theme of the dissertation: “Life cycle of the tourist product of the Samokov municipality destination”.

Author of the dissertation: Vasya Verchova Yaneva, unsupervised on an individual plan PhD student at the Department of Geography of Tourism at the Faculty of Geology and Geography at Sofia University “St. Kliment Ohridski”.

Research supervisor: Prof. Maria Stamatova Vodenska, Doctor of Geographical Sciences

The basis for the submission of this review is the inclusion in the composition of the scientific jury, determined by order No. RD 38-608/21.10.2024 of the Rector of Sofia University “St. Kliment Ohridski” and a decision of the scientific jury dated 24.10.2024.

The dissertation submitted for review is directed for public defense by decision of the Faculty of Geology and Geography - Protocol No. 11 dated 14.10.2024, and is in accordance with the requirements of the Act on the Development of the Academic Staff in the Republic of Bulgaria, the Regulations for its implementation and the Regulations on the terms and conditions for acquiring scientific degrees and occupying academic positions at Sofia University “St. Kliment Ohridski”, and all procedural requirements have been met.

1. Brief biographical data

The PhD student Vasya Verchova Yaneva was born on 14.09.1969. As can be seen from the attached CV, she obtained the “Master” degree (1989 - 1994) as a Master in Geography - a specialist in Territorial Organization of Recreation and Tourism and as a Geography Teacher at the Geography of Tourism Department of the Faculty of Geology and Geography at Sofia University “St. Kliment Ohridski”. For her graduation she defended her thesis on the topic: “Elaboration of a tourist map of the city of Sofia”. Before her higher education, she acquired “Culinary” qualification, specialty “Chef”. She worked as a teacher, as a technologist at “Domino Press”, and since 01.10.1999 she has been an assistant at the Geography of Tourism Department of the Faculty of Geology and Geography at Sofia University “St. Kliment Ohridski”.

Since 2023 (Order RD-20-1106/23.06.2023) she was enrolled as unsupervised on an individual plan PhD student at the Geography of Tourism Department of the Faculty of Geology and Geography at Sofia University “St. Kliment Ohridski” in the professional field 4.4. Earth Sciences (Geography of Recreation and Tourism), with a study period from 01.07.2023 to 01.07.2028 and research supervisor Prof. Dr. Maria Vodenska. After full implementation of the individual curriculum, positive attestation for the work and successful internal discussion for admission to defense, which took place on 18.09.2024, her study was terminated ahead of schedule with the right to defense.

The PhD student is fluent in French, as she graduated from the Henri Barbusse School with teaching of western languages in the city of Vratsa, but she also speaks English and Russian at a very good level.

2. Relevance of the problem discussed in the dissertation

The relevance of the topic of the dissertation is argued in many aspects in the introduction to the dissertation - the interest in the life cycle of destinations stems from the need for each tourist destination to be planned carefully, according to the stage of development, to constantly diagnose and analyze the phase in its life cycle in order to preserve the benefits not only for tourists and the tourism industry, but also for the social and natural environment as a whole, i.e. the development of tourism to be sustainable.

The topic is also very relevant because of the scope of the research object - the territory of Samokov municipality, includes both the Borovets resort and 35% of the area of the Rila National Park. Additional arguments could include the threat to ski tourism as a result of climate change and the need to develop a supply for year-round tourism. For this reason, enriching the classical model for determining the stage of the life cycle can be considered a serious scientific and applied challenge.

3. General characteristics of the dissertation

The dissertation presented for review is in the professional field 4.4. Earth Sciences (Geography of Recreation and Tourism). It is 277 pages long, of which 228 pages are main text and 24 pages are used literature. The questionnaires for the empirical study are presented as appendices. The appendices also include quantitative data on the tourism development of the municipality of Samokov and the resort of Borovets, as well as tables from the semi-structured interviews, with the total volume of the 5 appendices being 25 pages. The dissertation contains 26 tables, 4 map diagrams and 61 figures, duly numbered and presented in a list after the table of contents.

The bibliography is extensive and contains the most important publications related to the topic by foreign and Bulgarian authors. A total of 354 sources are listed in alphabetical order, of which 84 are in Cyrillic, 255 in a foreign language, as well as 15 Internet sources. A weakness in the bibliographic reference is that not all cited publications have complete bibliographic data - pages, editors of collective publications, etc. are missing.

4. Evaluation of the structure, scientific content, language and presenting style

The proposed structure of the dissertation is logical - Introduction, 5 main chapters related to the tasks and Conclusion, reflecting the implementation of the defined tasks. The structure is clear and logical, and the appropriate rubrics and good technical layout allow easy orientation and perception of the text.

The object of study and the subject of research in the dissertation are defined both in theoretical and empirical aspects. The scope of the studied destination is clearly delineated and coincides with the territorial scope of Samokov municipality, i.e. it has clearly outlined not so much geographical as administrative borders. The subject of research is correctly defined in

accordance with the topic and includes in a theoretical aspect the life cycle of the tourist destination, and in an empirical aspect - the life cycles of the individual products of the destination.

The formulated goal of the dissertation is “to determine the stage of the life cycle of the tourism product of Samokov municipality destination”. The tasks are clearly defined, they are in a logical connection and sequence, guaranteeing the achievement of the goal. They also outline the conceptual framework of the study, and are also bound by the presented methodological tools. The repeated collection of primary information from the tourism business in Samokov municipality in 2024 has also allowed the application of the comparative approach in the analysis of the empirical data. Despite the fact that a significant place is devoted to the methodology in the introductory part, it is also distinguished in the first chapter of the study, which is not only theoretical, but also theoretical and methodological.

A total of 8 tasks are listed, which reveal the algorithm of work and are in accordance with the structure of the research. They are listed in a logical sequence and generally correspond to the main chapters of the dissertation, but can be further grouped together. For example, the task “to study and analyze the scientific literature” concerning the concepts discussed in the first two chapters is an essential part of the first two tasks and can be integrated with them. Those tasks related to the COVID-19 effect on the evolution of tourist destinations and the justification of a life cycle model (task 7 and task 8) can also be integrated into the other tasks, since separate chapters are not dedicated to them, they are rather implied in the text and are not given special emphasis.

The first chapter is dedicated to the theoretical foundations of the study, reflecting the sequence of tasks, and also contains a methodological part, which presents and justifies the chosen theoretical model as a basis for conducting the empirical study - including a destination product model (a preference is expressed for the atomic model, also called "nuclear" by the author). The theoretical statements about the tourist product and the tourist destination are well thought out and systematically presented, and in addition to their essence, their structural elements are also examined in detail. Their working definitions, which the doctoral student uses for the purposes of the dissertation, are presented.

Based on the clarified basic concepts, the approach to developing the topic and the successive stages of the study are developed, organized into a separate methodological part of the first chapter. The sources of information and methods used are presented in detail, and the limitations of the study are also commented on.

The second chapter is dedicated to the concept of the “life cycle” of the tourist product and the tourist destination. Extensive scientific literature has been analyzed, including both individual models of different authors, as well as various constructive criticisms regarding their essence, applicability and substantive aspect. It would be better if the literature review of publications by Bulgarian authors reflecting the application of the life cycle concept was part of the second chapter and was separated from the definition of the life cycle stage/s in the fifth chapter.

The third and fourth chapters examine, respectively, the prerequisites for the development and the current state of tourism in the municipality of Samokov. The presented text is in-depth and comprehensive, both the product diversity and the territorial formations are commented on. The fourth chapter presents in sufficient detail and with visualization the

analysis of statistical data, as well as the results and conclusions from the empirical study, comparing the current with the previous field study and commenting on the changes and trends. The SWOT analysis refers to the situational analysis and is generally correctly prepared. A recommendation can be made for additional systematization of the strengths and a more in-depth review of the opportunities, among which some are actually strengths of the Samokov municipality destination (for example, lack of polluting industries, development of organic agriculture, capacity for project preparation and management, etc.).

The last chapter focuses on determining the life cycle stage of the Samokov municipality destination - of the tourist territorial entities, of the individual tourist sub-products and of the destination as a whole, based on the known studies of the life cycle of tourist destinations in Bulgaria (perhaps presented too extensively), in which different approaches and models have been applied, and the interpretations are correct. The stages of the life cycle have been determined based on the dynamics of the main statistical data on tourism in the municipality of Samokov during the periods 2008-2014, 2014-2019, 2019-2021 and 2021-2023, and the direction of development (increase, decrease or retention of values) of the indicators selected for tracking, as well as in a qualitative aspect according to the model of Buhalis (2000), with the final result being the achieved goal of the study - determining the life cycle of the territorial entities, the sub-products and the Samokov municipality destination as a whole. Based on the conclusions, guidelines for further sustainable development of tourism in the Samokov municipality tourist destination have been formulated, without being specifically addressed.

The Conclusion summarizes the results of the research. The hypothesis formulated in the introduction that “the life cycle of the tourism product and the tourism destination is determined by the life cycles of the tourism sub-products and the territorial entities in it” has been confirmed through empirical research. An assessment has been made regarding the applicability of the used model of the life cycle of destinations (Butler, 1980) and the need for its revision has been justified.

Regarding language and style – the doctoral student adheres to the scientific style of writing and handles the adopted terminology well. The narration is clear and precise, which makes the text easy and engaging to read.

5. Evaluation of the scientific and applied scientific contributions of the dissertation work

The main contributions of the dissertation are reduced to:

- ✓ Enriching the knowledge of the life cycle of mountain destinations through the extensive and in-depth analysis of the concepts available in the scientific literature for the life cycle of the tourist product and tourist destinations and their creative interpretation;
- ✓ Enriching the classical life cycle model through constructive and critical analysis and inclusion of additional indicators to be used in its determination;
- ✓ Collecting, processing and presenting new data on the state of tourism in the Samokov municipality destination;
- ✓ Empirically proving the thesis that the tourist destination and its product can be at more than one stage of its life cycle, since individual tourist sub-products and territorial entities are almost always at different stages of their life cycle.

6. Critical notes and recommendations

6.1. When drafting and submitting documents, more attention should be paid to avoiding technical errors:

- The title page has the text that the presented dissertation is a draft for preliminary discussion;
- A list of 17 major publications of which Assistant Professor Vasya Yaneva is an author or co-author is attached to the CV. Of these, two publications are repeated, one of which is presented with a different team of authors;
- Fig. 4 and Fig. 6 in the text of the dissertation are identical;

6.2. A certain contradiction is found in clarifying the boundaries of tourist destinations - the tourist destination “has physical and administrative boundaries” (p. 41) and 1.1.6. Boundaries of the tourist destination, where it is rather assumed that the boundaries are not clearly defined, unlike the boundaries of the Territorial system for recreation and tourism;

6.3. It is not recommended to use popular sites as sources of scientific information - e.g., http://www.bg-ikonomika.com/2010/11/19_8474.html (p. 66).

7. Abstract, reference to publications related to the dissertation and compliance with the minimum requirements

The abstract well reflects the content of the dissertation and is 48 pages long, including the table of content of the dissertation and a bibliographic reference to the sources of information used in the abstract. The abstract also contains graphs that reflect the main results of the study, namely the life cycle curves of the sub-products, territorial entities and the tourist destination as a whole.

The main contributions of the dissertation are correctly outlined and overlap with those indicated in this review.

The PhD student Vasya Yaneva has presented three publications directly related to the topic of the dissertation. In the reference, all three publications are presented with independent authorship, but the official note for one of them testifies to co-authorship with the research supervisor. Two of the publications are in Bulgarian and are in publications included in the National Reference List. The third was accepted for publication in the annual proceedings of the ERAZ Conference, which is indexed in the Web of Science Conference Proceedings Citation Index (Social Sciences and Humanities) with the issue of 2020. All subsequent issues are in the process of evaluation and it is not clear whether the 2024 proceedings will be indexed in order the PhD student to be awarded 30 points for this publication, according to the indicators for entry in the NACID system.

If 10 points are awarded for the publication from the ERAZ conference and with co-authorship of one of the publications, the doctoral student may not meet the minimum requirements of 30 points and may have to use other publications related to the topic of the dissertation in order to meet the minimum requirements of the Act on the Development of the Academic Staff in the Republic of Bulgaria.

8. Questions on the dissertation

Clarifying question to the PhD student: How are the concepts of tourism product and tourism supply related?

9. General conclusion

The elaborated dissertation presents the results of an in-depth study, which was grounded on a serious theoretical basis. It contains scientific and applied scientific results, which represent an original contribution to science. The requirement of Art. 64 of the Regulations on the terms and conditions for acquiring scientific degrees and occupying academic positions at Sofia University "St. Kliment Ohridski", that the dissertation should show that the candidate possesses in-depth theoretical knowledge in the specialty and abilities for independent scientific research, has been fulfilled.

The PhD student is well acquainted with the scientific publications dedicated to the life cycle of the tourist product and the tourist destination, as well as the state of tourism in the Samokov municipality. At the same time, she can plan and carry out independent research, knowing and being able to apply various methods for collecting, processing and analyzing information. Good personal knowledge, observation and research of the researched area and the significant secondary and primary information collected, as well as the methodological approach with the relevant tools, have allowed for a comprehensive and in-depth disclosure of the topic of the dissertation.

Based on the outlined contributions and regardless of some critical remarks, I highly evaluate the presented dissertation and propose to the esteemed members of the scientific jury to make a positive decision FOR awarding the educational and scientific degree "doctor" to Vasya Verchova Yaneva, in the professional field 4.4 Earth Sciences (Geography of Recreation and Tourism).

29.11.2024

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