

R E C E N Z I A

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(member of the Scientific Jury approved by the Order of the Rector of
the SU "St. Kl. Ohridski" with Order No. RD 38-91/20.02.2023)

Scientific field - 4. Natural sciences, mathematics and informatics.

Professional direction - 4.4. Earth Sciences ("Geography of Countries - Regional
and Political Geography")

Department of "Regional and Political Geography", GGF, SU "St. Kl. Ohridski"

Subject:

**MIGRATION PROCESSES AND PROBLEMS OF SOCIO-
ECONOMIC DEVELOPMENT IN KARLOVO AFTER THE LIBERATION**

Full-time doctoral student - PENKA LYUBOMIROVA PISACHEVA

1. DATA ON THE DOCTORAL STUDENT.

Full-time doctoral student Penka Lubomirova Pisacheva was born in 1976. Master's degree in "Geography" from the Faculty of Science of the University of St. Kl. Ohridski" - 2000. He works as a senior teacher at "Hristo Prodanov" Secondary School, Karlovo. Since 2019, she has been enrolled as a full-time doctoral student in the Department of "Regional and Political Geography" of the GGF at the SU "Kl. Ohridski"

2. DETAILS OF THE DOCTORAL STUDIES.

Since 2019, she has been enrolled as a full-time doctoral student in the Department of "Regional and Political Geography" of the GGF at the SU "Kl. Ohridski" with Order of the Rector No. RD 20-142/18.01.2019. Dismissed by Order of the Rector No. RD 20-447/17.02.2022

All data and documents for the educational process are presented. The dissertation work was discussed and directed to the defense of the extended council of the "Regional Development" and "Regional and Political Geography" Departments at the Faculty of Social Sciences of SU "St. Kl. Ohridski". The documents provided under the procedure comply with the Law on the Development of the Academic Staff and the Regulations on the Terms and Conditions for Acquiring Scientific Degrees and Holding Academic Positions at SU "St. Kliment Ohridski".

3. DATA ON THE DISSERTATION AND THE AUTHOR REFERENCE.

The dissertation is focused on local history and examines the problems affecting the socio-economic development and the reasons for the migration processes in the city of Karlovo and the Karlovo municipality. It is structured into 4 chapters, an introduction and a

conclusion. The volume of the dissertation is 255 pages and 22 appendices. There are 92 figures (diagrams, maps and photos) and 44 tables in the text. 262 literary and statistical sources were used (224 in Cyrillic, 39 in Latin, 35 normative documents and 49 boarding school addresses). This volume meets the requirements for this kind of research. The dissertation is in accordance with all the requirements of the Law "On the Terms and Procedures for Acquiring Scientific Degrees and Holding Academic Positions" and the regulations for its application. The structure of the dissertation corresponds to the topic and sufficiently illuminates the researched problem - the migration processes and the socio-economic development in time and space of the town of Karlovo and regions. The main requirements for a dissertation work have been met - stated goal and tasks, topicality and study of the problem, analysis of the state and trends, prognostic expectations and conclusion. The territorial scope is at the level of municipality and settlement. In connection with the topic of the dissertation work, 1 publication is presented. The abstract is prepared according to the requirements and reflects the essence of the dissertation work. The topic of the dissertation from a local history, scientific and applied point of view is current, the reason for which is the reflection of migration on the formation and development of settlements and territorial units. The analysis of the migration processes and the conclusions drawn should help to take adequate measures and policies. The current essence of the dissertation consists in the study of the problems affecting the socio-economic development and the reasons for the migration processes in the municipality of Karlovo. Migration, on the other hand, determines the tendencies to reduce the number of the population, its aging, the increasing unemployment, as well as the confirmation of migratory attitudes among the young population. The study of the cause-and-effect relationships between demographic and socio-economic processes makes the dissertation work relevant and its results can be used for making management decisions and developing municipal planning documents.

The object of research is correctly defined - the city of Karlovo and its hinterland (the settlements in the municipality of Karlovo and the municipality of Sopot). The subject of the research is precisely formulated - the changes in time and space of the ethnic, demographic and socio-economic appearance of the city of Karlovo and Karlovo Municipality after the Liberation. The goal set in the dissertation - the migration processes and problems of the socio-economic development of Karlovo after the Liberation correspond to the title of the dissertation. Emphasis is placed on the disclosure and analysis of the natural resource potential, the periods of demographic and economic development, the ethnic and cultural dynamics of the city and its adjacent territories. According to the purpose, the dissertation work traces the socio-economic problems, which are considered as an indicator for the development of the municipality of Karlovo and the city of Karlovo. The result of this is migration.

For the realization of the goal, 5 types of tasks are outlined, which are sufficient for the development of the dissertation work, but are not clearly linked and formulated with the set goal. The declared scientific hypothesis partially corresponds to the dissertation work and is of great importance for its practical orientation. The used methodology (not clearly stated) and research methods allow the realization of the set goals and objectives. The proposed methods are suitable for this study.

The introductory chapter covers the topicality and study of the researched problem. Here the object of study is characterized from a geographical point of view. The subject, objectives and tasks of the research are formulated. Various studies of Karlovo, municipal documents and own survey were used and analyzed. The information security of the research is indicated as a problem.

In the first chapter "Theoretical-methodological foundations of the research" the emphasis is on the conceptual apparatus, which is essentially the theoretical part of the research. The chapter is an overview, which is why it is too large and has no direct connection with the purpose of the study. On the other hand, it shows the theoretical preparation of the doctoral student. It is rightly stated that the similarities and differences between the territorial units according to various indicators, criteria and indicators can be analyzed through the typologies. They make it possible to analyze trends and perspectives in the development of territorial units and settlements. The chapter consists of 2 subchapters.

In the sub-chapter "Main indicators for the degree of socio-economic development" the methodology for the categorization of territorial units and settlements is approached. 3 categories of indicators are used here – natural-ecological, production-economic and socio-demographic. The infrastructural ones are not highlighted and it is not specified which indicators and indicators will be used in the study. It has been rightly stated that the availability of natural resources diverse in quality and quantity do not condition sustainable and balanced development, but are only a good prerequisite for development. The proposal to use the "geographic passport" as a "complex" overall characteristic for the territorial units, in which key indicators appear, from which conclusions can be drawn for proposing justified management decisions, is valuable. The importance of demographic potential and demographic processes in the "nature-society-economy" system is reported. They, in turn, are the basis for developing strategies, programs and projects.

The second sub-chapter "Migration as an indicator of regional development" is directly related to the topic of the dissertation work. Here, the essence of migration processes is examined from a historical-theoretical and behavioral point of view. The multifaceted nature of migration research is noted. It has been rightly noted that it is the basis of the redistribution of the population and the absorption of natural resources and human goods. Emphasis is placed on the impact of migration on territories sending or receiving migrants. It is reasonable to conclude that the negative results of migration are the wrong social and regional policy. For the purposes of the study, it is advisable to pay more attention to daily migration. All this allows migration to be used as an indicator of the socio-economic development of territorial units. Based on this, it is proposed to use specific management mechanisms called "regional policy". The statistical inaccuracy of accounting for real migration caused by the application of the legal framework has not been noted. It is correctly stated that the most suitable for the research is the complex geographical analysis combined with statistical, mathematical, historical, demographic, predictive, cartographic and other methods and approaches, and for the behavioral attitudes of the population - the survey method.

In the first chapter, the doctoral student shows knowledge of the research on the problem and knowledge of the scientific literature on the issue, which is also evident from the

rich set of literary sources. Various aspects of socio-economic development and migration are analyzed.

The second chapter "Emergence and development of Karlovo as an administrative-territorial unit until the Liberation" has a volume of about 45 pages. It consists of 3 subchapters, where a wide-ranging historical-geographic overview is made. In the first subchapter, a physical-geographical characterization of the Karlovo regions is made. The second subchapter is a historical overview of the development of the studied territory, ethnic changes and the formation of the settlement network from antiquity and the early Middle Ages. The third sub-chapter characterizes the period of Ottoman rule, when the Ottoman structure of government and the oriental style of building were imposed. It is stated that gradually the Christian population grew from the middle of the 17th century in a mechanical way. As a result, conditions are created for upward economic development (craftsmanship, trade and agriculture). It is stated that a large part of the Turkish population emigrated during the Russo-Turkish War of 1828-1829. Estimates of the population size and its structures for Karlovo are given by various authors. The economic activity and specialization of Karlov region for the studied period is characterized. The process of the gradual predominance of craftsmanship (accumulation of area-specific activities) and trade over agriculture is described. These changes have led to a radical change of the functional and architectural appearance of the city. This, in turn, leads to the attraction of settlers and the growth of its population.

The third chapter "Formation of the appearance of Karlovo as an economic and administrative-political center from the Liberation to 1989." has a volume of 68 pages. And it consists of 3 subchapters. They examine the economic development, the administrative-settlement structure and the demographic situation. Socio-economic development and specialization is analyzed for the different socio-political systems in Bulgaria. The decline of handicrafts and the transition to factory production and the development of specific agriculture (rose production, viticulture, fruit growing, horticulture, horticulture, beekeeping, animal husbandry) related to the relevant industry have been noted. During this period, the transport infrastructure in the area and activities from the service sector (health care, education, banking) were built. An upswing in the economic development of the city began after the Second World War as a result of the economic policy implemented in the country. The largest military-industrial complexes in the country are being built here. The development of industry is an attractive force for a migration wave. The data on the share of machine-building should be used more precisely, because it is not actually reported due to the secrecy of the activities of the military-industrial complex. During this period, the tourism industry began to develop on the basis of natural and anthropogenic resources.

At the end of the period and the subsequent crisis in the country, Karlovo lost its socio-economic and attractive power, which led to permanent emigration to the big cities (mainly Plovdiv and Sofia), and subsequently to abroad.

In the second sub-chapter, a historical overview of the administrative organizational role of the town of Karlovo in the various administrative-territorial planning schemes of the country from the Liberation until now is made. It is reported that after 1900 an important city-forming factor is military work and military production. From the 1930s, the architectural appearance of the city began to change. Administrative-commercial, industrial and residential

zones are distinguished. The new development eliminates the traditional division of Karlovo into Turkish and Bulgarian neighborhoods in the past. Attention is paid to recreation areas and playgrounds and to the overall appearance of the city. The remoteness of Karlovo from larger settlements makes it an important administrative, production, transport, commercial and tourist center and determines the significance of the municipality from a socio-economic and military-political point of view.

The third sub-chapter is a description of the demographic situation of the city and the municipality. It is rightly noted that comparative demographic analyzes cannot be made at the territorial unit level due to changes in territorial extent. The ethnic composition of the population is characterized by the significant predominance of the Bulgarian ethnic group over the others (77%), followed by the Turkish (21%). It has been pointed out that the greatest increase in the number of the population in Karlovo was in the 1960s, which was the result of its rapid industrialization and the related migration. The movement and structures of the population during the different periods have been correctly analyzed. It has been correctly reported that the economic stagnation and induced unemployment after 1989 caused significant emigration and ruralurbanization.

The fourth chapter "Modern socio-economic trends and problems in the development of the municipality of Karlovo and its administrative center" has a volume of 70 pages. It is developed in 5 subchapters. From a practical and applied point of view, this is the most valuable part of the dissertation work, where the scientific and research capabilities of the doctoral student can be seen. Modern problems in the development of the municipality are most clearly highlighted here. The decline resulting from the change of the socio-political system and the economic stabilization thereafter is reflected. All this affects the migration processes in the municipality. The different branches of the economy (legacy and new) are evaluated from a quantitative point of view. It is correct to conclude that the economic situation in Karlovo after 1989 has worsened due to the fact that large industrial enterprises have either been liquidated or their production has been severely curtailed. Deindustrialization is also one of the main reasons for the activation of emigration. On the other hand, the problem of the re-industrialization of Karlovo municipality does not figure in the municipal and state priorities in the short or medium term. These problems lead to a permanent decrease in the number of the population and its aging, which the doctoral student captured (from 1989 to now, the number of the population has decreased by 50%). Some ethnic changes (a 90% increase in the Roma ethnic group), a decrease in the birth rate, the emigration of young highly qualified staff and the shrinking of jobs have been identified.

The second sub-chapter "Economic, political processes and electoral behavior", in general, does not significantly contribute to the fulfillment of the set goal. The most valuable thing in it from a geographical point of view is the developed "geographical passport" of the municipality of Karlovo. According to him, the main deficits of the municipality are: insufficient agricultural areas and arable land, energy production, DMA, transport security, the number of enterprises, the lack of medical personnel, etc. The leading role of the secondary sector is maintained and that of the tertiary sector is increasing. The tourism potential of the municipality was assessed. The main difficulties of the traditional economy of the municipality have been identified, such as the reduction of some agricultural productions, insufficient financial resources and investments, qualified personnel, etc. Unemployment,

almost twice as high as the national average, was cited as a problem. It has been correctly stated that the failure to use the opportunities for development leads to problems, strongly affecting the economic and demographic crisis, the lack of development of new industries and technologies, the low level of the values of a number of economic indicators, the lack of medical personnel, etc. If the General Development Plan (GDP) and the Karlovo industrial zone project are implemented, economic growth can objectively be expected. In my opinion, the analysis of the electoral behavior of the population is superfluous.

The third sub-chapter is informative about the functioning of the transport infrastructure and why it was designated as a secondary axis of the Sub-Balkan Road. No consideration was given to whether the degree of urbanization was objectively determined in the "National Spatial Development Concept". Whether the existence of 3 more cities is taken into account in it and whether it is a reasonable decision to separate Sopot as an independent municipality. The location of the city of Karlovo has been correctly determined, which balances the uneven location of the regional centers. The shortcoming that the municipality of Karlovo does not have a general development plan has been reported.

In the fourth sub-chapter, a review of the planning and normative documents of the municipality of Karlovo after 2007 is made. They represent the problems related to the migration processes in the municipality and the negative results of this. The topic of migration is not only present in the documents related to energy efficiency and in the programs for tourism and community activities. From 2021, ODA will be replaced by a Plan for Integrated Development of a Municipality, where the advantages and development potential of the municipality are assessed, including vision, goals and development priorities linked to the ambition for a higher standard of living of the population and sustainable territorial development. The doctoral student correctly doubts that the vision may not be realized due to the lack of a General Building Plan. The management and development program includes the main goals, priorities, deadlines and activities for their implementation.

In the fifth subchapter, the relationship between local self-government and migration processes is sought. A report was prepared on the Index of Civic Participation, according to which the Karlovo municipality's rating is 3.40 (on a six-point scale). The lack of opportunities to inform citizens and civil organizations and the ambiguities in the procedures for assisting NGOs and civil groups, which leads to non-transparency in decision-making, have been rightly noted. It is precisely stated that intra-municipal migration is mainly related to the daily trips of students to educational institutions. It is a correct conclusion that the high negative mechanical growth is characteristic of cities with waning industrial functions, such as the city of Karlovo, which is one of the major socio-economic problems of the region. Since 1990, mechanical growth has had negative values. Therefore, the doctoral student is rightly directed to conduct a survey of the quality of life and management and the attitudes of the population towards emigration. She does two surveys in different age ranges (18-82 and 18-19). The finding that the predominant reasons for emigration are economic for both sexes, and for girls, better education and health care abroad may have practical managerial value. The results of the survey and the analysis of its results indisputably prove the established working hypothesis. The conclusion is correct that the course and directions of the migration processes in the municipality of Karlovo and its socio-economic development during the various stages are connected and interdependent. The strongest influence is socio-economic

(disparity between the territorial location of the population and labor resources and vacancies), psychological (aspiration to search for good conditions for work, recreation, cultural activities, etc.) and to a lesser extent of transport factors.

In this chapter of the dissertation, the doctoral student confirms her abilities to make a regional economic-geographical analysis of migration flows, to analyze and interpret the empirical and survey material.

The conclusion summarizes the results of the dissertation in a scientific-cognitive and practical direction. It gives a good idea of the work done in the dissertation work. In it, the city of Karlovo is defined as an important administrative and economic center in the Plovdiv region and the country, through which main roads and railway lines pass. The study of socio-economic and demographic development and migration processes allows to determine the main reasons that led to their current state. It has been correctly reported that during the transition to a market economy in the municipality, many productions were closed or restructured, which in turn leads to problems in socio-economic development and objectively creates prerequisites for emigration. The available natural and anthropogenic tourism resources are not fully utilized. Social and economic insecurity lead to the activation of migration processes and an increase in people's attitudes towards emigration. The main reasons for emigration from the municipality are family reasons, the insecurity of young people for realization in Bulgaria, the unstable political and economic situation in the country, the desire for better conditions of work, life, health care, education, etc. According to the poll, the main problems of the population in the municipality of Karlovo are the state of public services, "B and C" services, health care, transport, electricity supply, cleanliness, the closing of businesses in the area, unemployment, the closing of schools in the villages, the lack of funds for smaller settlements, etc.

The improvement of the city (construction of parks, children's and sports grounds), the development of tourism and the revival of traditions, the management of the municipality, the preservation of the Military Museum and the military unit, access to large shopping chains are considered positive changes.

Some notes can be made to the dissertation work:

1. The structure of the dissertation does not lead to a clearer logical presentation;
2. Significant historicism;
3. There are no analytical conclusions at the end of the chapters;
4. No critical evaluation of the used information base (errors allowed by the current statistics) has been made;
5. Not shown how to apply the results in practice;
6. There are repetitions.

The attached list of contributions correspond to the analyzes made. Some of the input points are not precisely worded and may undergo editing. The main contributions in the dissertation enrich the existing local knowledge and have a scientific and applied nature.

In general, the scientific merits of the dissertation work are:

- the conceptual and terminological apparatus is sufficiently fully and accurately explained from a scientific and cognitive point of view;
- the cause-and-effect relationships between socio-economic development and migration movements of the population have been established;

- a detailed historical overview of the development of Karlovo and Karlovsko was made;
- a geographical passport of the municipality of Karlovo was created, which can be used for analyzes and assessments;
- a public opinion poll was conducted on the quality of life, the management of the municipality and the emigration attitudes of the population;
- the graphic and cartographic materials are well developed.

In the dissertation, a huge volume of empirical material was processed, which was systematized and correctly interpreted. I recommend that the dissertation work be reworked in a local lore form and printed.

The dissertation work and the publication are the independent work of the doctoral student.

Conclusion: The presented work is up-to-date, dissertationable and in a finished form. The doctoral student demonstrates the necessary knowledge and skills for successful independent scientific work by using modern scientific research methods. From the analysis made and the results obtained in the dissertation work, it can be seen that the formulated goal has been successfully fulfilled. Regardless of the remarks made, based on the above-mentioned scientific contributions and merits, I propose to the Scientific Jury to award Penka Lubomirova Pisacheva the scientific and educational degree Doctor in the scientific specialty Geography (Geography of countries - Regional and political geography).

Sofia, 04/05/2023

Reviewer:
(Prof. Dr. C. Mladenov)