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ABSTRACT

Topic:

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

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INTRODUCTION

Karlovo Municipality is one of the largest municipalities in Bulgaria and occupies about 0,94% of its area (1059 km²). According to this indicator, it ranks 8th in the country, which implies the presence of a relatively rich natural resource potential. It produces about 0,70% of GDP and is home to 0,68% of the country's population. In this sense, the values of demographic and economic density of Karlovo municipality can be defined as not high. However, the standard of living of the population in the municipality is similar to the national average.

The overall combination of natural resource potential, important cultural events, tourist resources of national significance, notable personalities and others from the settlement of the Karlovo region in antiquity to the present is the basis of its modern socio-economic and demographic development. The uniqueness and interconnectedness of the settlements in the study area often makes it almost impossible to separate the town of Karlovo from the municipality of Karlovo. Therefore, in this study, information about them is often intertwined, and in some cases the names „Karlovsko“ or „Karlovo region“ are used as synonyms of Karlovo municipality and Karlovo.

The town of Karlovo established itself as an important administrative and commercial centre in the region even before the Liberation. Its role was strengthened after the Second World War with the construction of some of the largest enterprises in the country, for example, IMZ, TK „Teodosi Markov“, „Bulgarian Rose“, etc., producing huge industrial output and providing many jobs for the population. Later on, some of them lost their power and the Karlovo municipality developed at a slower pace.

The interesting combination of natural and anthropogenic resources of the Karlovo region is the basis for its socio-economic development. As a result of the political changes in the country after 1989, during the years of transition to a market economy, most of the industries in the municipality were discontinued or severely curtailed, which is the reason for the disparities in its development. This has led to emigration of the population to large cities and abroad, a decrease in the total number of inhabitants, and even depopulation of some settlements in the municipality. Thus, from being one of the most developed municipalities in the recent past, Karlovo Municipality is lagging behind in economic and demographic terms.

The relevance of the present study is related to the investigation of the problems affecting the socio-economic development and the causes of migration processes in Karlovo Municipality. It is also conditioned by the tendencies of population decrease in the region, its ageing, increasing unemployment, as well as by the migration attitudes of young people. These processes are linked to the lack of good working conditions and adequate wages in the municipality. The study of the causal links between demographic and socio-economic processes in Karlovo makes the research important and relevant. The data and conclusions of the study can be used for management decision-making as well as for the preparation of municipal planning documents due to their relevance and comprehensiveness.

The analysis of the state of various development indicators, for example: spatial, economic and demographic potential, demographic and economic density, degree of

urbanization, infrastructure development, etc., also determines the relevance of the study. These aspects serve as a basis for the present study of the city of Karlovo and the territories gravitating towards it, as well as for the identification of trends for their future development. The main **object** of the study is the town of Karlovo and the municipality of Karlovo, their associated settlements and their hinterland.

The **subject** of the research are the active changes in the ethnic, demographic and socio-economic shape of the town of Karlovo and Karlovo Municipality after the Liberation. Attention is also paid to the reasons that gave rise to these changes during the different periods of development. Emphasis is placed on the discovery and analysis of the natural resource potential, the periods of demographic and economic development, the ethnic and cultural dynamics of the town and its adjacent territories.

The **aim** of the study is to trace the socio-economic problems as an indicator of the development of the municipality of Karlovo and the city of Karlovo, as a consequence of which the migration processes in it appear. In order to achieve this goal, the historical, demographic and socio-economic processes and factors influencing the development of the studied geographical site from its settlement to the present day have been studied.

In order to achieve the objective, the following research tasks have been set:

- Analysis of the main indicators of the degree of socio-economic development, as well as the impact of migration as an indicator of regional development;
- Review of the historical, demographic and economic development of Karlovo and the territories gravitating towards it until the Liberation as a basis for the subsequent post-Liberation development;
- Study of the stages of Karlovo's formation as an economic and administrative-political centre from the Liberation to 1989;
- Tracing the contemporary economic and demographic situation of the municipality of Karlovo and its administrative centre;
- Revealing the peculiarities of local self-government and migration processes in the municipality of Karlovo, etc.

„Migration processes in the municipality of Karlovo (and the town of Karlovo) are linked to its socio-economic development during all stages of the period under consideration (after the Liberation). When the economic importance of the municipality increased, migrations in the municipality were mainly directed towards the municipal centre and the mechanical growth was positive. During the economic stagnation, emigration to large cities and abroad increased“.

A system of research methods was used for this study. These are balance sheet, comparative and factor analysis, survey, cartographic, demographic, mathematical, historical, forecasting and other methods. A combination of chronological and spatial comparisons are applied, based on available research, cartographic and statistical data.

Various studies of Karlovo region that have been carried out to date have been used, as well as municipal documents. The opinions expressed by citizens surveyed from different settlements in the municipality have been analysed in relation to the assessment of the quality of life, pressing problems in the area, as well as people's attitudes towards relocation

and emigration. Meetings were held with representatives of different ethnic groups (Bulgarians, Turks, Karakachans, Roma), with employees of the Municipality of Karlovo, Municipal Library, Municipal Historical Museum, etc.

The preparation of the dissertation was accompanied by problems in obtaining the necessary statistical information. Many of the sources available to users offer such information only at the district level, and during the socialist period the database was extremely limited. Nevertheless, dozens of sources and scientific works have been studied, and the available information has been analyzed and presented in accordance with the stated objective. Many local, geographical and historical studies are related to Karlovo, but a comprehensive economic and demographic analysis has not yet been done.

Structure of the thesis

The dissertation consists of an introduction, four chapters and a conclusion with a total length of 227 pages. A list of abbreviations used, a list of references used and a list of appendices are included separately. The bibliographical reference lists 263 sources in Cyrillic and Latin. In addition, 35 normative documents and 49 Internet addresses are listed. The dissertation contains 44 tables, 95 figures and 22 appendices. The numbers of all figures and tables included in the abstract correspond to their numbering in the dissertation.

Publications related to the thesis

Pisacheva, P., M. Rusev. Origin and development of Karlovo and its adjacent territories until the end of the Ottoman period. – In: Yearbook of the Sofia University, Book 2 – Geography, Volume 114. Sofia, 2022.

CHAPTER ONE. THEORETICAL AND METHODOLOGICAL FOUNDATIONS OF THE RESEARCH

1.1. MAIN INDICATORS OF THE DEGREE OF SOCIO-ECONOMIC DEVELOPMENT

Individual countries and their statistical or administrative territorial units (regions, districts, municipalities, lands, settlements) are distinguished by specific natural-ecological, socio-demographic and ethno-cultural features. The similarities and differences between them can be analysed through a number of typological approaches using a variety of criteria, indicators and indications. Using and studying them makes it possible to analyse trends and prospects in the development of different geographical regions, settlements or parts of them.

As particularly characteristic indicators for studying the socio-economic development of a region can be taken: spatial, natural resource, demographic, economic and scientific-technical potential, economic and demographic density, quality of life, degree of urbanisation, labour market, industrialisation, financial and environmental efficiency, etc. They are grouped according to various attributes, but the division into natural, demographic and economic indicators is the most common. Many of them are related to the study of the relationship between the demographic factor and the social element of economic development and can be seen as an extension of Copeland's (1937) ideas on the social element in development research. Such are, for example, the studies of Pigou (1933), Keynes (1936), Dunlor (1948), Wachtel (1984), Thurow (1970), Okun (1975), Hag (1990), etc., and in Bulgaria - the scientific works of a number of demographers, geographers and economists in higher education institutions and institutes.

For a more accurate accounting of some economic indicators, the ratio of their values to the number of population (e.g. GDP/person), the ratio of relative shares of some indicators (e.g. % employed or unemployed, pollution, degree of urbanization, etc.) are determined.

In recent years, in addition to the well-known socio-economic indicators, the environmental aspect has also been emphasised to measure the efficiency of production in regions and countries. In this way, the „*complex efficiency*“, which according to Rusev (2004) includes social, financial and environmental aspects of the economy, is taken into account. It includes economic, social and environmental efficiency.

Researching and studying the criteria, indicators and indications of socio-economic, demographic and environmental development of a territory helps to determine its proper regional policy. This study focuses on natural-ecological, productive-economic and socio-demographic criteria, indicators and indications and their role in sustainable, economic and demographic development.

1.1.1. Natural-ecological

In research in geography, ecology, biology and other sciences, as well as in high-level meetings of a number of international organisations, the natural cost of societal progress is increasingly being addressed. In 1968, the Club of Rome, in its report *The Limits to Growth*, drew public attention to the Earth's growing population, economic progress and the

diminishing natural resources, as well as to the environmental situation resulting from economic development.

Brundland's (1987) definition in the report presented by the United Nations General Assembly („Our Common Future“) is generally accepted: „*Sustainable development is development that meets the needs of the present without taking away the ability of future generations to meet their own needs*“.

According to the UN, achieving sustainable development requires countries to coordinate their efforts to build a sustainable future for the people of the Earth. The goals and objectives of sustainable development are related to harmonizing the main elements: „*economic growth, social inclusion and environmental protection*“ (<https://www.un.org/sustainabledevelopment/development-agenda/>).

The creation of laws related to sustainable development must be tailored not only to the needs of today's society, but also to those of future generations, in order to guarantee them no less development opportunities. The Sustainable Development Goals adopted on 25 September 2015 by 193 UN Member States and a plan for a better future, called „*Ending poverty, fighting inequality and injustice, protecting our planet*“, are in this context.

Environmental criteria, indicators and benchmarks are important for sustainable development. These are measured by the degree of change in natural components and the main sources of their pollution. Examples of natural indicators and benchmarks are: accessibility in terms of geographical location and natural conditions, the proportion of forests, soil fertility, the climatic and water characteristics of the study area, the availability of quality natural resources.

1.1.2. Production-economic

For the study of the economic development of a certain territory (country, region, district, municipality) the determination of the values of both the main production-economic indicators and the natural and demographic indicators and indices has a role. In this way, the causal links affecting the economic development of the geographical area under consideration are examined.

The main non-financial production-economic indicators are market output and that for own consumption, gross and net value added, consumption of fixed capital, taxes and subsidies on production and products, income taxes, etc. (Basic..., 2020). Main financial economic indicators are GDP, GDP/capita, expenditure on acquisition of fixed capital goods, labour productivity, etc. (Social..., 2021). In recent years, new indicators such as bio- and circular economy have been added to the traditional economic development indicators (Social..., 2020).

Important studies of production-economic linkages, indicators and indicators are the works of Behrend (1963), Fox (1966), Shienstock (1981), Marsh (1982), Green (1989), Striboeck (2006), Barley (2008), etc., and in Bulgaria – Boyadzhiev (2000), Dimov (1989), Milkova (2005), Rusev (2000, 2012), etc.

For the accuracy of geographic studies, it is important to report specific indicators, e.g. % of industry in GDP, values of polluting industries in the OPP, etc. An indicator applicable to all industries is *the Labour Cost Index* (Stoychev, 2012).

An important indicator of the status of a country, planning area, district or municipality is the „*geographical passport*“. It enables conclusions to be drawn about the current socio-economic situation and about future development and priorities (Rusev, 2001) The author believes that when studying an administrative territory, the geographical passport should be combined with classical research methods and used in the design of municipal development strategies. It is based on publicly available data, necessarily in %. These are presented in a table, with the indicators with the smallest percentage compared to the national total at the top and ending with the industries with the highest share. In each geographical passport, it is mandatory to include the so-called „*key indicators*“ - population density, GDP, territory. In this way, from the ranked indicators at the beginning, at the end of the table and those around the key indicators, conclusions can be drawn (at the beginning there is a comparative shortage, at the end – economic specialisation and export opportunities) that can serve as a basis for correct regional management decisions.

1.1.3.Socio-demographic

Modern geographical research emphasises the nature-society-economy nexus, i.e. economic development is influenced not only by the presence (or absence) of natural resources, but also by the demographic potential of the territory. Criteria are used to assess its status, the importance of which is taken into account by the values of the indicators and indicators that specify them. Socio-demographic indicators can be grouped in different ways depending on the need of the study. Each country implements a system of measures related to its population policy. These include the consideration of a number of indicators (demographic potential, fertility and mortality rates, average age of the population, etc.). The specific demographic policy is implemented on this basis. The interaction between demographic indicators and socio-economic development is the basis of the scientific works of Coale (1972), Core (1992), Harvey (1996), Mithcell (2003), Aalbers (2003), etc., and in Bulgaria - Slaveykov, Yankov (1995), Trajkov (2000), Rusev, Naydenov (2004), Yankov (2004), Rusev (2008), Naydenov (2004, 2008, 2012, 2018, 2019), Patarchanov (2017), etc.

According to Naydenov (2012), the globalization and migration processes in our modern times, taking place within and between countries, the dependence of people on the development of the global economy and the situation of the environment lead to the need to create projects, programs and strategies at national and international level.

1.2. MIGRATION AS AN INDICATOR OF REGIONAL DEVELOPMENT

1.2.1.Socio-demographic and spatial nature of migration processes - causal links and influences

Migrations have existed since ancient times. They were originally triggered by the need to find better living conditions, as well as the need for convenient shelters for security and defence. As a result of political-economic and socio-demographic problems, migration has become a key factor in the redistribution of wealth worldwide in recent years.

Important studies on migration are those by Ravenstein (1885), Petersen (1958), Lee (1966), Harris and Todaro (1970), Linev (1967), Slaveykov and Yankov (1995), Treibel (2008), Vasilieva etc. (2014), Dimitrov (2014), Chernega and Bondarenko (2016), and others.

In today's information society, mass media, as well as demographic policies pursued in different countries, have a significant impact on migrations and their destinations. The economic development of regions in the world is possible if their socio-economic policy is associated with an increase in the quality of life, i.e. its often poor quality is the main reason for migrations.

People migrate from less developed regions to those that have higher values of regional socio-economic development indicators. This leads to many demographic, social and economic problems in migrant sending countries and has a negative impact on their regional development. Often these processes are an indicator of incorrect social and regional policies.

Migration processes go through certain phases/stages which are interrelated—*table 2.*, Slaveikov and Yankov (1995) identify factors determining migration, for example: natural, socio-economic, psychological, ethnic, religious, political, environmental, transport, etc. The approach studying migration as a consequence of the combined action of push and pull factors, known as the *push-pull* model, is widespread (Markov, 2015).

Table 2. PHASES OF THE MIGRATION PROCESS

Phase 1	Phase 2	Phase 3
Creation of conditions for territorial movement of population.	Relocation, migration or change of territorial status	Adaptation and settlement of settlers in new places

Compiled from: Slaveikov, Yankov, (1995)

In recent years, attention has also been paid to so-called „*reverse migration*“. It is associated with the return of some migrants to their country of origin (due to failure, retirement, innovations related to higher education or financial opportunities of the returnee, etc.). Thus, return migration is an opportunity to return social, financial and cultural capital and knowledge.

● *natural, cultural geography (cultural landscape) and population movements*

Geography is often divided into two main parts - natural and social. Natural studies the combination of natural components in a given geographical space, their connectivity, and their importance for the development of human activities. The natural environment is the foundation on which human society develops. Cultural diversity plays an important role in the emergence of migratory flows.

For Ishirkov (1926), the culture of nations is a combination of material and spiritual acquisitions which man, thanks to his reason, has won from nature through their ennoblement. The nature-culture relationship is found in Radev (1924), Hassinger (1931), Sauer (1962), Patarchanov (2007), Stoyanov (2017), Atanasov (2018), and others. It defines that the landscape includes the cultural and natural features of the studied region, taking into account the processes of globalization. According to him, the material heritage of the region is preserved by the cultural landscape. The author considers that the processes of globalisation nowadays lead to processes of intensive migration, as well as innovations in technology, transport and communication.

The current processes of regionalization and globalization, the differences in socio-economic development - the „*center – periphery*“ model, are the basis for the emergence of large immigration flows. They are mostly caused by the low level of socio-economic development of a part of a region (periphery) and the lack of good working conditions and wages. Socio-economic geography studies the economic development of regions and countries and its links with migration processes, thus (together with demography) explaining the causes that give rise to economic migrations. Typically, in these cases, the migrants are young people who gradually bring their families with them, and this leads to reproductive problems in the countries sending migrants. It is characteristic of economic migrants to adopt some of the cultural traditions of their host country.

● *natural and mechanical population movement*

Population movement is the result of quantitative demographic changes due to the influence of various factors, for example: ethnic composition, standard of living, economic situation of the country, social structure, participation in wars or regional conflicts, political processes, fertility, increased urbanization, level of health care, mortality, migration, etc. It includes processes of natural and mechanical movement. Often the development of a region, its political, economic and even environmental situation can influence the processes of natural and mechanical movement. The analysis of their values is an accurate indicator of regional development and policies as well as the effectiveness of regional development.

The natural movement (natural increase) is the result of both natural reproduction and the stage of demographic transition traveled by a country. It is characterised by birth, death and natural increase rates. The birth rate initiates the natural movement, which according to Devedjiev (1989) depends on a number of factors, e.g. level of socio-economic development, age and marriage structure of the population, standard of living, employment of women, urbanization, etc. Mortality is mainly related to the age function, directly expressed in population ageing (Devedjiev, 1989). It is mainly influenced by ageing, the nature of life and work, environmental conditions, industrialization and urbanization, education, health status of the population, political and religious factors, etc. Natural increase is the difference between birth and death rates in a territory.

The mechanical movement (mechanical growth, migration) of a population is reported as the difference between the number of emigrants and immigrants in a given territory. The factors determining migrations act in a complex way, and in the modern stage the leading causes of migrations can be considered to be socio-economic. Their influence is refracted through the interest of a group of people or an individual, and the leading factor is the mismatch between the location of the population and the labour opportunities. Based on the state of migration phenomena and the development of migration processes in a given territory, its migration situation is determined. Migration is both internal and external. Internal migrations take place in and out of internal territorial units (settlements, municipalities, districts) without leaving state borders. The main motives for these migrations are the search for work, deteriorating housing conditions, marriage, enrolment in an educational institution, etc. So-called labour migrations are also often considered as part of internal migrations.

External migrations are also important for the formation of mechanical growth. The main reasons for these are mainly economic and social, as well as the presence of so-called hot spots, which cause large refugee waves. Immigration has a somewhat positive impact on the economic and social situation in migrant-sending countries, through the resources they send, and in migrant-receiving countries, due to the possibility of filling job vacancies and economic growth.

Migratory movements accompany societal development, and their linkage to economic progress is stronger in industrial and post-industrial societies, where better living standards and wages are attractive to immigrants from less developed areas of the world and condition migration processes between them. Thus, the development and path of migration flows serve as an indicator of the linkages between socio-economic and regional development and natural and mechanical population movements.

● *mechanical population movement, urbanization processes, regional development and policy*

Migration processes affect many areas of the economy, social life, demography, security, trade, culture, etc. Studying and measuring them, as well as solving issues related to the mechanical movement of the population are accompanied by various difficulties, for example, lack of control of temporary and permanent address registration, lack of a uniform methodology for accounting for permanent migrants, etc. (Simeonov, 2009).

The process of increasing the role of cities in the development of society Slaveikov and Yankov (1995) define as urbanization. It is associated with the concentration of population, social and productive infrastructure in cities and their hinterlands. Important role in the course of urbanization process is played by CSOs, colonization, mass migrations, NTP, industrialization, development of transport mobility of population, etc.

According to Slaveikov and Yankov (1995), cities attract population with „*expected or real advantages of urban lifestyle*“. Sometimes these expectations of immigrants are not justified and lead to disappointment (sometimes to re-emigration). Peykowska (2019) considers that urbanization can be considered as a manifestation of migration and that it is the most characteristic process of internal migration processes. Thus, the population in urban areas increases at the expense of rural ones. External (international) migration also contributes to this (especially settlement in large cities in developed countries).

The relationship of migrations with urbanization has been studied by Ravenstein (1885), and at that time migration was mainly described as a movement from villages to cities. Later, this linkage was addressed by Devedjiev (1989), Slaveykov and Yankov (1995), Bencivenga and Smith (1997), Stoyanov (2017), Dumont (2018), Peykovska (2019), and others. Urbanisation (often driven by migration processes) has a number of negative impacts. In the current period of lack of active investment policy in rural areas, the disparities in working and living conditions between towns and villages are widening. Neglecting the negative effects of urbanisation is one of the main causes of the demographic crisis.

The settlement network has been shaped by the historical development of the world's regions. The administrative-territorial division, the form of government and the internal

structure of a country are important for regional and settlement development. Regional development refers to the activities carried out by the State in order to realise prosperity of its territorial units. It involves the implementation of legislative, administrative, environmental, socio-economic and other aspects in a specific region. For the regional development of regions, governance mechanisms referred to as regional policy are used.

1.2.2. Statistical and methodological aspects of migration research

Tracking the development and directions of migration flows and processes is based on a large amount of statistical information from a variety of sources. The obtained data are analysed and conclusions are drawn. The reasons that gave rise to migration, the historical features of the period, the characteristics of the migratory contingent and the socio-economic development of the various regions are important factors in the study of migration processes.

Various methods, approaches, coefficients and formulae are used to study migration and migration processes. The basis of such studies are indicators such as the number of population, the number of settled and displaced, the volume of migrations (migration balance), the % of migrants in relation to the total population of a given territory, the coefficient of mechanical population growth, etc. The main concept for characterizing migrations, explaining people's migration behavior, is the migration concept (Denchev, 2019). Migration motivations and some indicators of socio-economic development serve as its basis. According to Denchev, surveys are also used to study migration perceptions. It is related to the study of people's motives for emigration, their expectations from the decision to leave their native places, adaptation to the host country, the ability to support their families financially, attitudes about their future stay abroad or return to their home country, etc. (McNee, Dimitrova, 2019).

The study of migration attitudes of the population is also based on their prediction. Statistical information on past and present values of migration processes in a given region, its socio-economic development, analysis of its demographic situation, etc. is used for forecasting. In 2008, Mladenov made a clarification about the forecasting of migration attitudes of the population, which depend mostly on economic factors. He believes that without an assessment of the attraction/repulsion power of individual regions it is impossible to predict the migration behaviour of the population.

Georgiev-Cherkovaliev (2019) proposes a series of methods to be used in combination in the study of migration and migration processes (comparative analysis, event analysis, structural analysis, cluster analysis, GIS and cartographic methods, SWOT analysis, PEST analysis, Delphi method, etc.). Similar methods for studying the demographic situation are proposed by Vladeva and Vladev (2019) who pay special attention to the so-called population gravity zone in administrative centres. Their combination allows clarifying the reasons for spatial and socio-economic development of the territory and migration processes. The relationship between socio-economic development and the level of migratory mobility in a region (or between regions) is measured by indicators such as migration balance, total number or relative share of the population (relative to a region or country), relative share of the urban population, level of employment in different economic

sectors, average life expectancy, % employment and unemployment, GDP/person, investment, number of enterprises and jobs, etc.

For the study of migration processes and their impact on the development of individual countries, regions and smaller administrative units, it is not possible to unify the methodology used. In the present study, a different set of tools has been applied to the different demographic and socio-economic indicators characterised. The most commonly used methods and approaches are: complex geographical analysis, statistical, mathematical, historical, demographic, forecasting, cartographic and other methods and approaches. Attention is paid to correlations between the historical, socio-economic and demographic development of the territory under consideration (Karlovo and Karlovo Municipality), economic and political processes, people's electoral behaviour, as well as to a survey of public opinion and migration attitudes of the population.

CHAPTER TWO. ORIGIN AND DEVELOPMENT OF KARLOVO AND ITS ADJACENT TERRITORIES UNTIL THE LIBERATION

2.1. GENERAL GEOGRAPHICAL CHARACTERISTICS OF KARLOVO

The town of Karlovo is situated in the eponymous Trans-Balkan valley-between the Koznitsa Ridge to the west and the Krastets (Strazhata) to the east, in the southern foothills of the Kalofer Mountains and in the northern foothills of the Sušćinská and Srenská Sredna Gora (*fig. 1*). Its individual quarters lie between 388 m asl in the south and 545 m asl in the north.

According to the Karlovo Municipality RDP (2014-2020), part of the territory of the Karlovo valley is flat and hilly with altitudes ranging from 260 m above sea level at the town of Banja, to 500 m above sea level in the north-western and eastern sections.

Petrov and Stoychev (1992) believe that the Karlovsky Graben was formed during the Pliocene and Quaternary, and was filled with Pliocene lacustrine sediments and Quaternary alluvial, pluvial and delluvial overlays. According to information from the Karlovo Municipality RDP (2014-2020), lignite coal has been found in the grabens (near the town of Banya) with total reserves of over 100 thousand m³. However, no development of the deposit is foreseen in the near future.

Figure 1. THE KARLOVO VALLEY AND ADJACENT AREAS



Compiled from: NSI

The climate in the region is transcontinental with mountain influence. The average annual temperature is 11,4°C and the average annual rainfall is 653 mm, with a maximum in May and a minimum in February and March. The rivers flowing through the valley are the Stryma River and its larger tributaries, the Stara and Biala rivers. The Stara River passes through Karlovo, on which the waterfall of Suchurum (since 1989 „Waterfall“) was formed before entering the town. It is approximately 480 m above sea level and the water fall is about 8 m. One of the natural riches of the Karlovy Vary region are the mineral springs (Banya, Stoletovo, Klisura, Kliment).

The most widespread are the alluvial and alluvial-fluvial soils, and of less agricultural importance are the cinnamon forest soils. In general, the soils are suitable for growing cereals and fodder crops, oil rose, lavender, vines, etc.

2.2. ANCIENT AND EARLY MEDIEVAL

It is believed that the earliest inhabitants of the Karlovy Vary Valley settled there as early as the 6th millennium BC. Archaeological research shows traces of a rich culture in the Neolithic, Copper and Bronze Ages. During the Thracian Iron Age, the area was controlled by the kings of Odrya. Objects of Thracian origin have been found on the territory of many of today's settlements in the municipality. In the 2nd century the area of Stryama became part of the Roman province of Thrace. Important for the area in this period was the road linking the ancient Ulpian towns of Escus/Ezeus (now Gigen) and Nove (Glass/Sistovo/Svishtov) with Philippopolis (now Plovdiv) – *fig. 3*.

In ancient times along the valley of the river Stryama large-scale construction of road forts and other structures was carried out. North of Karlovo passes the route of another sub-Balkan Roman road connecting the Black Sea coast with Serdica and the Adriatic coast. Fortresses were also built along its route, part of which are the Karlovo and Sushik Kale.

Figure 3. ROMAN ROADS IN BULGARIA DURING ANTIQUITY



Compiled from: <https://www.portal-silistra.eu/news/8924>

In the VI-VII centuries the valley of the r. Stryama was settled by Slavic tribes ruled by Byzantium, but later were part of the newly created Bulgarian state. Different authors

assume that Karlovo is the successor of either the medieval fortress of Kopsis (Kopsa, Göpsa, Geopsa) or of the Sushik Kale.

According to Undzhiev (1968) in the 13th and 14th centuries. The sub-Balkan area came under the feudal dominions of the boyar Smilets and was an important border region. After his death, his brothers Radoslav and Voisil fled to Byzantium. During the same period Eltimir was the ruler of the region. In 1322, he was the ruler of the town. Voisil, with the help of Byzantium, entered the Trans-Balkan lands and conquered the area from Sliven to Kopsis. Thus he established a separate principality, vassal to Byzantium, with the main fortified town of Kopsis. The newly elected Bulgarian ruler Michael III defeated the Byzantine troops and conquered Kopsis. After his death in 1330 there is no mention of Kopsis (Nenov, 1972).

Penkov and Hristov (1978) believe that Karlovo was established on its present site as the successor of a settlement burnt by the Turks. No other sources mention the burning of the old settlement. Furgov (1931) writes that its history is unknown, but it is known that it survived the Ottoman invasion, and that the origin of its name is Slavic-Sushitsa. Mikov (1943) determines that the name is ancient and means waterless, dry, and that it was mentioned in a charter of Constantine Asen with the name Sushitsa.

The manuscript of the Renaissance teacher Rajno Popovic is the most reliable source for the fate of the medieval settlement and has been used in a number of studies of Karlovo and the region. According to it, there was also a monastery next to the site of the old Sushitsa, which was destroyed when the Turks settled, and according to Deyanova (2005) and Undzhiev (1968), the Kurshum mosque and the hamam (bathhouse) were built with the materials from it. Undzhiev believes that the marble pillars next to the mosque, some of which bear Christian symbols, are evidence of this.

There are several main hypotheses that are used to try to reveal the etymology of Karlovo. Many authors support the idea that Sushitsa (Sushnitsa, Sushniche) is the ancestor of Karlovo, and that it is the old name of the town (Aprilov, 1841; Bogorov, 1851; Furgov, 1931; Undzhiev, 1968; Gandev, 1972; Borisov, 2015; Keel, 2017; Boykov, 2018, etc.). Borisov (2015) mentions that in the 16th century, besides Sushnice, the town was known as Šahin кой and Karlaoglu пазаār, the latter probably beginning to be used around 1550. Boykov (2018) believes that while the Turks used the name Šahin, the Christian population called it Sushnice for a long time. Most researchers believe that the founder of the town was Karlu Zaade Lala Ali Bey (from Turkish „Son of Karli's victorious Ali Bey“). The name of the city of Karlovo is considered to be undeniably Turkish, regardless of whether it is associated with a translation or an individual person.

2.3. OTTOMAN RULE

2.3.1. Settlement and architectural development

According to various sources, the time when the lands of the Karlovy Vary region are assumed to have been conquered by the Ottoman Empire was between 1481–1485. According to an Ottoman register, Karla Ali Bey received lands with a total area of about 500 km² as a private fief. It mentions as settlements Shahin Gyolu (Susice) and Livadice. (Borisov, 2015; Boykov, 2018). The latter is smaller and with time disappeared as a

geographical feature. Later, the property was bequeathed to be used for religious purposes and acquired the status of a waqf.

Figure 6. THE CHURCHES „ST. MARY“ AND „ST. NICOLAS“ TODAY



Source: The Internet

When Karlovo was settled, the Turks occupied the modern northern part of the city (north of the Kurshum Mosque), where they established the Turkish Kasabata neighborhood. Bulgarians settled south of it (in the Shahan/Shan neighbourhood). Initially there was a meadow and forest vegetation between the two neighbourhoods, but in the early 18th century they were gradually built up. Thus, a mixed neighborhood-Tabashka-emerged near the Arap Bridge.

After the Kurshum Mosque, three more mosques were built in the Kasabata in the 16th and 17th centuries, eventually becoming eight. In the 15th century the Church of St. This can be taken as evidence of a significant presence of a Bulgarian Christian population despite the repression and expulsions in the first decades after the Ottoman invasion. A second church („St. Nicholas“) was built in 1847 after a special ferman (*fig. 6*) obtained from the Sultan.

The town is distinguished by the typical Turkish oriental appearance characteristic of those times. The streets are narrow and crooked. The houses are isolated by high walls. There is a Turkish school in the courtyard of the Kurshum mosque, administrative buildings and a charshiya around it, and several strange inns and cafés near the Arap Bridge.

At the beginning of the 17th century, the settlement acquired the character of a town and became the seat of the Göpsa Nahia (Strem district), which was one of the main reasons for its growth. Towards the end of the 18th century. Karlovo became a centre of attraction for settlement of Bulgarian population.

2.3.2. Movement and ethno-social structure of the population

Concrete information about the population of the Karlovo region, as well as about its lifestyle and cultural features, is almost missing before the Ottoman invasion. Its formation and development was the result of general ethno-demographic processes, mainly related to Thracians, Romans, Slavs and Proto-Bulgarians. According to Keel (2017), after the disappearance of Bulgarian statehood the region was settled mainly by Turkic nomads (Yuruts). The Islamic religion was also imposed among part of the incumbent population (those who converted benefited from taxes).

Borisov (2015) cites data from inventories of Ottoman registers on the proportions of Muslim and Christian populations in Sushnice in the 16th century (*table 3*). At the end of the sixteenth century, the number of inhabitants of Karlovo exceeded 1000. Gradually the

settlement emerged as a market centre, increasing its economic potential and making it attractive for settlement.

Table 3. DATA FROM THE OSMAN REGISTRIES OF RELIGIOUS AFFILIATION OF THE POPULATION IN SUSHNICHE (now KARLOVO)

	Christians				Muslims			
	Families	Unmarried	Settled	Priest	Families	Unmarried	Settled	Imam
1516/18	41	1			6	1		
1530	33	4			9	1		
1570	115	2	5	1	62		4	1
1596	163	3			116	30		

Compiled from: Borisov,(2015)

According to Boykov (2018), a characteristic feature of this period is also the reports of craftsmen (bakers, iron workers, shoemakers, etc.) designated by Muslim names and the predominance of Turkish population in the area. It also states that the number of Christians increased mainly by mechanical means. The results in a study by Popov (1967) confirm the predominance of the Turkish (Muslim) population, but according to him, in the middle of the 17th century there is a certain tendency towards its decrease. Among the reasons for this were the casualties due to the wars waged by the Ottoman Empire, the cholera, plague and typhus epidemics characteristic of the period, etc. Probably these processes are the basis of the tendency of a kind of gradual Bulgarianisation that began in the 18th century. It was based on the growing desire of Bulgarians from surrounding villages to buy property in the Karlovo area in order to develop crafts, trade and agriculture. This created the conditions for upward economic development, which reached its pre-industrial climax during the Renaissance (Muchinov, 2019).

In 1819, Konstantin Ikonom wrote that there were about 1000 families in Karlovo, only ¼ of whom were Christians. One of the reasons for this, according to Keel (2017), was the parallel processes of partial religious and linguistic assimilation of the Bulgarian Christian population that continued until the end of the 18th century. Part of the Turkish population of Karlovo was displaced during the Russo-Turkish War in 1828-1829 (Muchinov, 2019). However, for economic reasons, in the mid-19th century, a large number of Turkish population resettled in Karlovo from nearby Sopot (Petrov, 1986).

According to Kanitz (1879), immediately before the Liberation (1874-1875) the Turkish population in the town was already only 1/6 of its almost 9 thousand inhabitants. He also states that the number of Bulgarian houses was 1200, Turkish - 300 and Jewish - 60. A representative chronological tracing of the absolute demographic dynamics for the town in the 19th century is made by Muchinov (2019). Its main data are presented in *table 4*:

Table 4. THE POPULATION OF KARLOVO IN THE XIX century

Year	1819	1835	1841	1843	1856	1871	1877
Number of residents	5000	8000	5000	6000	10000	9000	9500

Compiled by: Muchinov,(2019)

According to the magazine „Letostroy“ in 1872 Karlovo was second after Plovdiv in the Plovdiv kaaza in the number of Bulgarian families, and in the number of students – together with Kalofer – was third after Plovdiv and Koprivshitsa. The tendency of

increasing population since the middle of the 19th century is probably due to the accelerated economic development. After the Crimean War, however, some of the craftsmen were ruined as a result of the import of European goods, which led to migrations.

Petrov (1986) says that in the mid-19th century Jews in Karlovo engaged in trade, which according to Ikonov (1856) took place mainly in Wallachia. Irechek and Karavelov are of the opinion that many residents of Koprivshtitsa and Karlovo settled in Plovdiv in the 18th century.

During the Renaissance and especially just before the April Uprising and the Liberation, Karlovo supported the national liberation movement, and its inhabitants actively participated in most of the uprisings, the Bulgarian Volunteers, the Liberation War, etc. Thousands of sacrifices were made, the exact number of which has not been established to this day. In Karlovo, this period is known by the term „The Terrible“. As a result of the unprecedented cruelty, more than 1500 Karlovo citizens lost their lives (Slavchev, 1934). The pogrom led to drastic changes in the number and demographic structure of the Bulgarian population in Karlovo. There are published reports of over 700 widows, but the number is probably much higher.

After the end of the war, part of the Turkish population returned to the town, but the Jews were expelled from the Karlovo widows. Thus, the Jewish community in Karlovo practically ceased to exist (Rusin, 2016).

The events related to the April Uprising and the subsequent Russo-Turkish War led to a significant reduction in the population of Karlovo and heavy material losses. The 1880 census in Eastern Rumelia showed that Karlovo had just over 8 thousand inhabitants.

2.3.3.Changes in the economic structure and specialisation of the municipality

One of the first records of the economic potential of the Karlovo vakuf at the beginning of the Ottoman rule is the state register cited by Boykov (2018), which contains data on the amount of taxes collected in 1516 – a total of 5997 acta, while by the end of the 16th century the amount was almost 4 times higher (*table 6*). Their increase can also be conditionally taken as an indicator of the almost fourfold increase in the number of inhabitants in the waqf during the mentioned period-from about 3 thousand to 12 thousand people.

Table 6. REVENUES OF KARLOVO WAKF DURING THE XVI CENTURY (in acres)

Year	Revenues
1516	5997
1528	5984
1530	6187
1570	21 954
1596	23 596

Compiled by: Boykov (2018)

Borisov (2015) cites an Ottoman village inventory from 1549, which mentions that tax revenues were generated from economic activities such as wheat, grain, vineyards, hay, walnuts, sheep, pigs, beehives, cocoons, mills, etc. A register from 1570 also mentions

handicraft and trade professions-abbajji, tabakci, mutafci, terzi, kuyumji, halvajji, sapunji, bakali, etc. (Glushkov, 2014).

Although according to Ottoman norms Karlovo had the status of a town, its main economic outlook in the 16th–18th centuries was agricultural. The main crops were wheat, rye, barley, corn, millet, fruit (including grapes), and the leading livestock industries were cattle breeding, sheep breeding, pig breeding, and beekeeping. A specific livelihood of the region is the cooperage, and in the 18th century changes took place in connection with the mass cultivation of oil rose.

During the Renaissance, there was already a clear predominance of crafts and trade over agriculture in Karlovo and the settlements around it. Bogorov (1851) describes Karlovo, emphasizing that the town was a factory town, the population consisted of Bulgarians, Turks and Jews (about 15 thousand) and the main trade was gaytanj. Later Bogorov (1868) uses the definition „*handicraft town*“, describing traditional crafts for the Turkish population of the town (snuff-making, candlesticking, soap-making and barbering), as well as for the Bulgarian (gaytanj) and Jewish (trade in various manufactures). The products were sold in Smyrna, Bursa, Cairo, etc. (Georgiev, 1932).

Based on the above, as well as other authors, Hristov (2017) makes a comprehensive economic description of the city. 24 esnafs are listed: Abadzhi, Kaftanji, Bakal, Dulger, Chifchi, Fur, Papukchi, Goldsmith, Vaptsari, Basmadzhi, Furnadzhi, Astartji, Bakardji, Pottery, Mutafchi, Vodenicharski, Terzi, Gaytanji, Samardzhi, Koprinarski, Shepherd, Katsari, Tepavicharski and Arabadzhi. In 1857, some of them merged and the number was 17.

Another key industry in Karlovo was the artisan metallurgical production. A leading role was played by foundry, the production of castings and the processing of bronze products. Nenov (1972) claims that until the Liberation the town was the only foundry centre in the Bulgarian lands. The close specialisation in rose production as well as in the brewing of brandy was a prerequisite for the Kazanji industry, the production of which began to grow rapidly in the 1820s. The old ceramic vessels were gradually replaced by copper vats for distilling and storing the rose oil. According to Fergov (1931), the Karlovy Vary people were the first in the country to copy the Middle Eastern experience and build rose oil distillation facilities with copper vats.

Karlovo was one of the few centres in our country for the production of tin pavors and lead roof structures. Towards the end of the 18th century, dulgering and ironwork were developed and registered in a common esnaf. Directly related to the gaitand, hodden and other textile industries was the manufacture of steel scissors. Quilting, pottery and jambic craft also stand out as major crafts.

The biggest influence on the specialisation of the agricultural production in Karlovo region is exerted by the natural conditions and resources and some characteristics of the population (number, cultural traits, production traditions). Cereal farming, viticulture, farming of roses, walnuts, mulberries etc., are the leading ones among the horticulure branches. Rose farming is with the highest degree of specialisation among them.

Stara reka River was an important water and energy source for Karlovo and its economic development during the National Revival. It played a main role for the production of vegetable oil, for textile dying, fulling making, metallurgy, wind power industry, *kyurkchijstvo*, tobacco farming, *mutafchijstvo*, gunpowder manufacturing. The latter had 25 workshops at its disposal and the bigger part of their production was used by the army of the Ottoman Empire. In 1873–1874, the first wollentextile factory was opened in the town and around 30 people worked in it. The Ottoman *bashi-bazouk* destroyed it in 1877.

The industrial development during the National Revival made Karlovo highly dependent on the import of raw materials and the export of produce and creates conditions for the development of trade. A number of stocks and shops came into existence in the town. Its guests could be accommodated in 12 inns. The richer Karlovo traders established their own trade houses in Tsargrad, Vienna and a number of cities in Romania and other neighbouring countries. A lot of them donated funds to buildings in native Karlovo and other Bulgarian towns. The donations of Evlogi and Hristo Georgievi Brothers with which they support a lot of Bulgarian municipalities, churches, hospitals, schools, student's book authors, the publishing of books and newspapers, the education of Bulgarians abroad are a typical example for that.

The changes in the demographic and economic development of Karlovo from its creation as an administrative and economic centre in XIV–XV century to the Liberation show a positive tendency in the expansion and establishment of the town as a crafts and trades centre. These functions of its become a base for its attractive role for population of nearby settlements and the constant migration processes realised towards Karlovo. This also proves the connection between the industrial development and the immigration of population in the town, and the result turns out to be the rise in its numbers.

CHAPTER THREE. FORMATION OF THE LOOK OF KARLOVO AS AN INDUSTRIAL AND ADMINISTRATIVE-POLITICAL CENTRE FROM THE LIBERATION TO 1989

3.1. SOCIO-ECONOMIC DEVELOPMENT AND PRODUCTION SPECIALISATION

3.1.1. Development of Karlovo to the end of the Second World War

After the Liberation, Karlovo fell into industrial decline (Daskalov, 2005). The events from the last decades of the Ottoman rule had influence over this process. Karlovo was part of Eastern Rumelia. Crafts and trade were most affected by the stagnation. The main craft in the Karlovo region – woollen braiding – also fell into decay. The reasons for that were the high custom duties as well as the loss of traditional markets. Goods from abroad were imported in the autonomous province, with which the crafts production was unable to compete. This led to poverty and famine in the up to then developed town. Gerasimov (1986) emphasizes the fact that Karlovo's citizens were put into despair because no new forms of livelihood were introduced and it was impossible to go back to the old ones.

Gradually, factory production was introduced, for instance: in 1891 a Thin Hodden and Woollen braidings Factory was built in the town with funds donated by Evlogi Georgiev, in 1904 the „*General Partnership Ivan Valkov and Son*“ was founded, which

apart from woollen braidings also produced hodden and thin hodden, the production was enhanced, a factory was built and it is preserved to this day. In 1927 a textile factory „*Todor Enkin and Sons*“ (Todorov, 2005) and in 1928 the cooperative textile mill „*Spasenie*“ were opened.

In the mid-1890s a factory for cobbler sticks, two factories for lasts, three tobacco enterprises and three darak factories (Fargov, 2013; Hristov, 2017) as well as two joint-stock companies – „*Stara Planina*“ (1885) and „*Vinoproizvodstvo*“ (1925–1944) were created. The „*Factory of the Matevi Brothers*“ (producing pastrami and sujuks) went into production in 1890, as cattle was raised for its needs in the Balkan Mountains.

At the beginning of the XX century ways to cope with the economic crisis were searched. In 1902 and 1903 the „*Prosveta*“ newspaper put forward the proposition that Karlovo could develop as an „*agricultural town*“. Agricultural productions, traditional for the region, were determined – rose farming, wine-growing, fruit-growing, gardening, silkworm breeding, bee-keeping and animal husbandry. In relation with these, processing plants were also created (steam distillery for rose processing, installation for rose konkret etc.). Until 1927 the rose distilleries were 38 and the firms processing the rose blossoms and producing rose oil were 23 (Deyanova, 2016; Hristov, 2017). The centre of the Rose Valley back then was Karlovo and the rose industry was one of the main in Bulgaria. The Karlovo region remained the biggest production centre for roses and rose products until the end of the Second World War.

According to Fargov (1938) in the mid-1930s there were another 6 factories for mint and rose oil distillation, „*four small rose distilleries, ten enterprises and workshops for raw animal skins, one cardboard factory, a modern cocoon drying-room, a modern wine cellar, a chemical laboratory for cosmetics*“ etc. There were also workshops for the making of cars, winnowing, rose stills, iron beds, water pumps as well as the only Bulgarian workshop for luxurious metal articles.

After the opening of a HPP at the north of the town (in 1926), a process of electrification of crafts workshops, housings, factories etc., began, as a result of which unemployment decreased. Workforce from nearby settlements began to immigrate towards Karlovo.

During the 1930s in Karlovo, the foundation of the military industry was laid (Hristov, 2017) and the factory „*Glavni samoletno–remontni rabotilnitsi*“ went into operation in 1939. In 1940, the production of tractors began.

Besides electrification, communications and transport networks were also of importance for the economic development. A sub-post office in the town was opened in 1879. According to the Shkorpil Brothers (1892), the main roads crossing Karlovo were the Republic Road and the one from Nikopol through Troyan to Plovdiv (through Karnare and Karlovo). Parts of them went over the old Roman roads (*see fig. 3*). Later a railway and a roadway were constructed along some of them and today they are still part of the main transportation arteries of the country. 1933 the railway connection with Plovdiv was completed and train station Karlovo opened. 1939 the construction of the road section Karlovo–Kazanlak was completed (Devedzhiev, 1983). The railway section Karlovo–

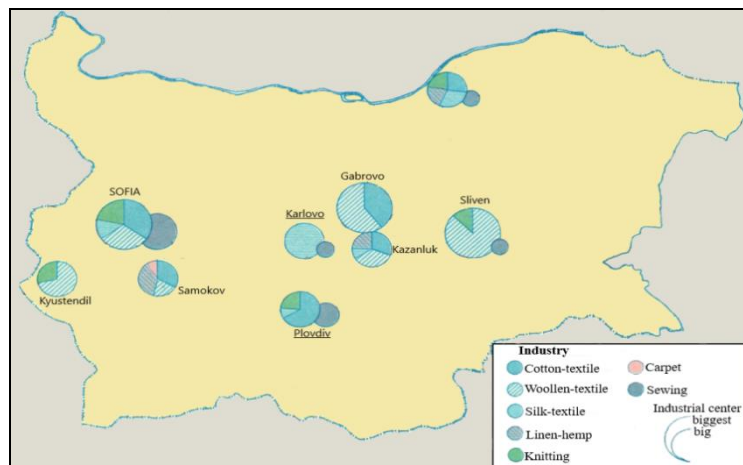
Klisura was built in 1949 and the last railway section of the Republic Road (Klisura – Makotsevo) was finished in 1952. In this way, the town was linked to the transport network of the country. The roadway Karlovo–Plovdiv was asphalted around 1963.

Besides transport, other branches of the service sector began to develop in the municipality – healthcare, education, banking. The first hospital was opened in 1880, in 1901 it was moved to another building and today’s hospital was built in 1968. Important for the economic development of the town was also the Karlovo Popular Bank, grounded in 1913. Its capital played a crucial role for the survival of the economy of the town during the wars (1912–1918) and the postwar crisis (1918–1923). It was closed down in 1951. In the 1930s there was also a branch of the Bulgarian agricultural bank, which financially supported the construction of the agricultural bank, the wine cellar and the county cocoon drying-room (Alexandrov, 1938).

3.1.2. Economic boom of Karlovo after 1944

The economic boom of Karlovo began after 9.IX.1944 and the nationalization of 1947. The „Ivan Valkov and Son“ factory and the one of Evlogi Georgiev were nationalized after the Second World War. They were added to the TF „Teodosi Markov“, which was housed in a modern building. In the 1980s, almost half of the silk fabrics produced in the country were made there (fig. 23) and the employed were 1240. The factories „Todor Enkin and Sons“ and „Spasenie“ were nationalized in 1947 and turned into DIP „Chervena Zvezda“ (Hristov, 2017). In 1976 DIP was also added to the textile factory „Teodosi Markov“ (Patevoditel..., 1989).

Figure 23. KARLOVO IN THE TEXTILE INDUSTRY IN BULGARIA IN THE 1980s



Compiled from: Atlas..., (1984)

The other developed national businesses in the region were also nationalized. The slaughterhouse of the Matevi Brothers was the base for Meat processing plant Karlovo, the cardboard, darak and fur factories were transformed into the National Promfactory „Kosta Mitev“. IP „Targoviya“, branch „Hlebna Promishlenost“ (1973), Vagonoremonten zavod (1964), Vinprom (1947), Can factory (1947), Milk factory as well as the large for the region machine manufacturing factories were also created in town. A tractor factory was opened and the military industry developed. The complexity between the military departments and the industry connected with them in the Karlovo region led to the establishment of one of the biggest military-industrial complexes in the country during Socialism. The biggest of

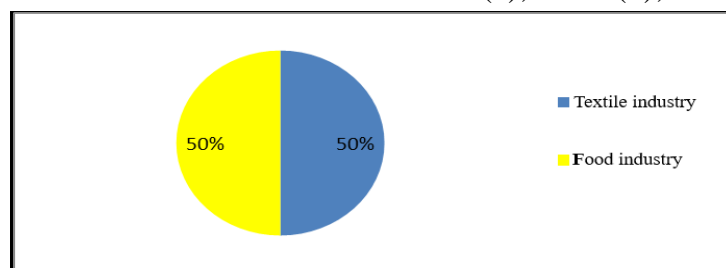
them is VMZ, which had 26000 employees in 1985 and is supposedly the absolute leader in Bulgaria until the end of Socialism (Hristov, 2017). Domostroitelten kombinat was also created and aimed at provision of social housing for the large influx of immigrants from the nearby villages in Karlovo.

In 1948 the emblematic for the region „Bulgarian rose–Karlovo“ factory was opened. The production of cosmetics for the domestic and foreign markets began widening in 1976, the rose distilleries in Karlovo, Kazanlak, Plovdiv, Gorna Oryahovitsa and Shumen merged. In the 1980s “Bulgarian rose” was one of the big cosmetics-perfumery companies in the country.

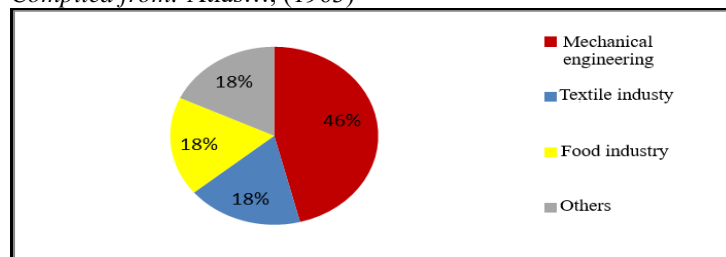
The availability of a number of vacant working positions was the attractive force for migration for many of the citizens of the nearby settlements, and not rarely also the social housing. This way, the migration waves from the villages towards the industrial centre nearby were connected to the development of the many factories there.

The economic development of Karlovo during the socialist boom is shown on *fig. 31* (a, b, c). In 1960 Karlovo was a small town with primarily developed light-industry branches, the main of which were the textile and the food industry, with almost equal share of 50% (*fig. 31, a*). With the introduction and development of machine manufacturing and other productions, in 1979 Karlovo was, population-wise, already one of the middle-sized towns, the biggest share being that of machine manufacturing–46%, followed by textile and tailoring industry, the food industry and other branches with almost equal shares (*fig. 31, b*).

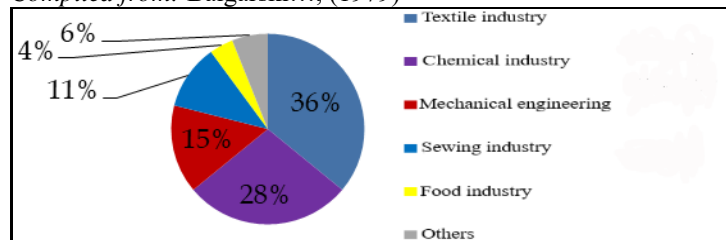
Figure 31. THE INDUSTRY OF KARLOVO IN 1960 (a), 1979 (b), 1984 (c)



Compiled from: Atlas..., (1963)



Compiled from: Balgarski..., (1979)



Compiled from: Atlas..., (1984)

The biggest economic boom of Karlovo could be seen on *fig. 31* (c). In the mid-1980s significant shares were displayed by the textile (36%) and the chemical industry (28%).

Tailoring industry was bettered (around 11%), but the share of the machine manufacturing industry decreased (from 46% in 1979 to 15% in 1984) and that of the food industry—from 18% to 4%.

During Socialism, the factories in Karlovo had economic connections primarily with the countries from CMEA, despite this, a few of the factories traded outside it, for instance, TF „Teodosi Markov“ exported goods for FRG, France, Austria, Italy, Spain, Finland, Turkey as well as for Syria, Jordan, Libya, the Lebanon etc. (Gerasimov, 1986).

Transport services in Karlovo developed parallel with the industry. The roadway and the railway connecting the capital city and the Black Sea through Karlovo were „an important factor for the allocation of manufacturing capacity in some of their transport meeting-points...“ (Prirodnijat..., 1990). They were the key reasons for Karlovo to turn into a large economic centre in district Plovdiv.

At the beginning of XX century in Karlovo, the development of other service-industry branches began. Some of the former inns were turned into hotels, new ones were also built.

Figure 32. THE NATIVE HOUSE AND THE MONUMENT OF VASIL LEVSKI



Images: Personal archive, Internet

There was a large number of anthropological and natural resources for the development of tourism in the town. In honour of the native heroes monuments were erected and memorial plaques placed. The most emblematic are the native house and the monument of Vasil Levski (fig. 32). Other frequently-visited tourist spots in Karlovo are the History Museum, the ATK „Starinno Karlovo“, the „20. Juli“ square, the „Suchurum“ waterfall etc.

Karlovo has always been not only a touristic, but also a trade centre. The main trading activities in the town during Socialism were conducted by branch „Karlovo“ and DSO „Targoviya na edro“ – Plovdiv.

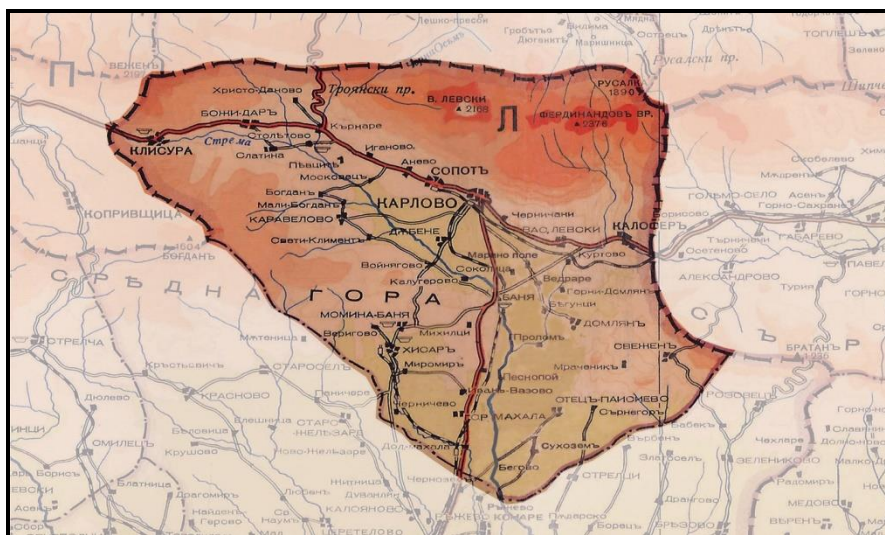
A number of schools and kindergartens were created during the different stages of the existence of the municipality. The professional schools prepare cadres for the factories in the region.

The dissolution of the Socialist Bloc led to an economic crisis. A number of factories in the Karlovo region were negatively affected by it and subsequently closed. Just a few managed to restructure their production in a way to stay competitive on the market and exist to the present day, for example, VMZ, Bulgarian rose, Meat processing plant Karlovo etc.

3.2. SETTLEMENT STRUCTURE, ADMINISTRATIVE AND CULTURAL POLITICAL ROLE

In the different periods, Karlovo is an administrative centre with a different status, and the number of the settlements gravitating to it has not always been the same. The biggest it was in Karlovo county after the Liberation (50), which, with slight changes, remained the same until 1956 (fig. 34). That same year the county began dropping out as an administrative-territorial unit and in 1959 it started being referred to as a municipality. According to the censuses in 1956 and 1972, the number of the settlements in Karlovo municipality was the smallest – respectively 5 and 10. Change in the scope of Karlovo was observed in 1974 when Sushitsa was declared a neighbourhood of its. 1979 the term „settlement system“ was introduced. That same year the Karlovo settlement system (later municipality) consisted of 28 settlements whose number has remained almost unchanged even to this day (fig. 38).

Figure 34. KARLOVO COUNTY – 1942



Compiled from: Administrativna..., (1943)

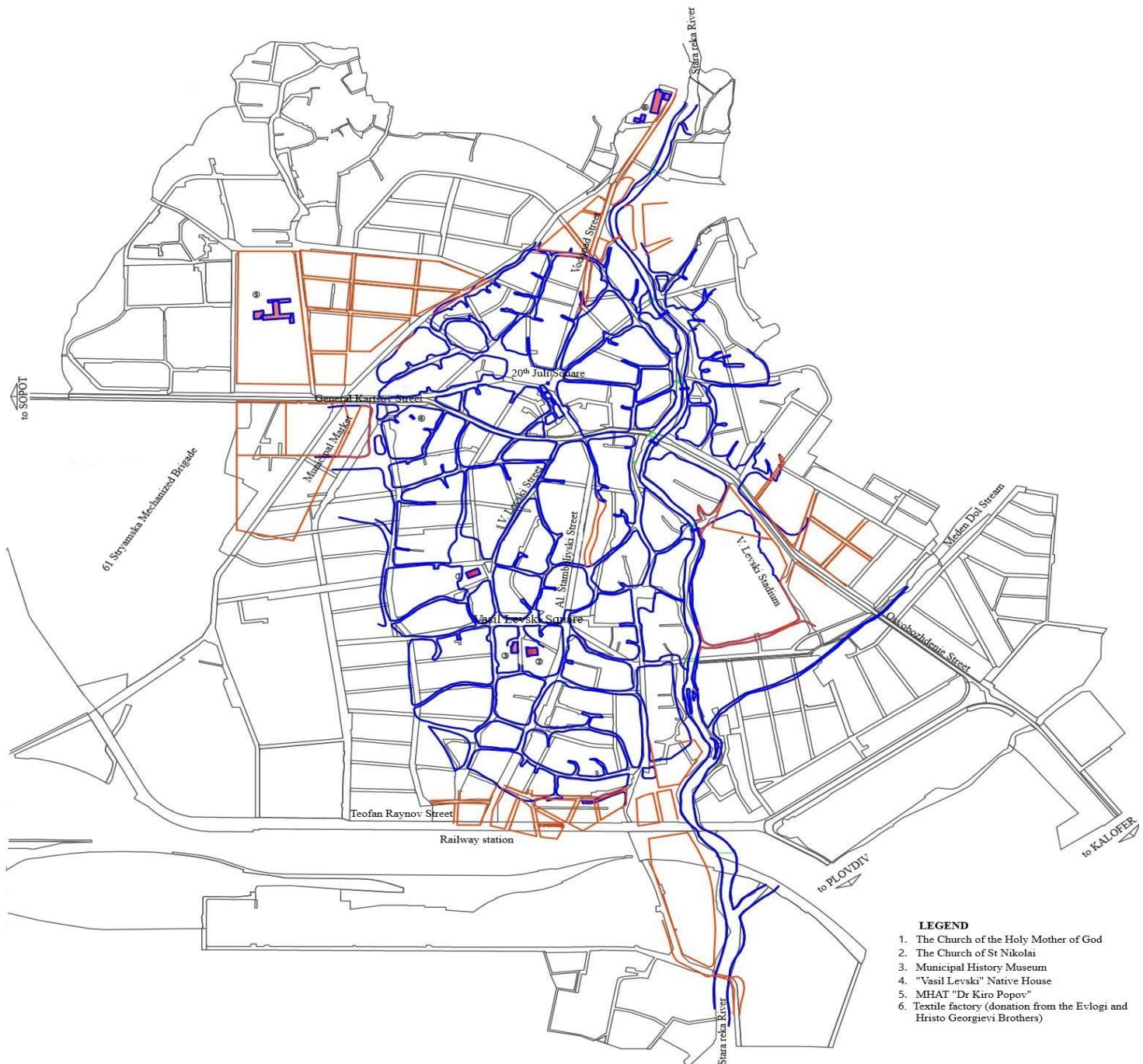
An essential element accompanying the development of the town and the municipality after 1900 is the military services. The first regiment in Karlovo came from Haskovo in 1904. The participation of the citizens of Karlovo in the country's military forces was first in 1879 when the 4th infantry Karlovo regiment of the Eastern Rumelia militia was formed. After the Unification in 1886, Stremaska (Karlovo) county was part of the Kazanlak military district. Changes in the national military organization followed as well as the introduction of different military structures to the town. Until 1934 the regiment was infantry and from 1938 on an air fighter regiment exists.

Changes in the town's military services occurred after the Second World War, which were followed by the opening of different branches and testing grounds in Karlovo and the region. After 1989 changes in the Bulgarian military forces followed. The army (the Stryamska Mechanized Brigade included) were restructured and meet NATO's standards.

Since its foundation, the military department has played a defensive and a crucial social role for the population of Karlovo and the region. It together with the connected with it factories forms the so-called Military-industrial complex which provides a lot of job positions for both male and female labour force.

Besides the defensive, Karlovo has an important administrative function. The architectural style in Bulgaria began to change in the 1930s. Karlovo changed its look as well. A lot of the old buildings and even entire streets were demolished and in their place new ones on the Western model were built. The streets are now straight and the Bulgarian Revival style typical for the sub-Balkan towns is a thing of the past (fig. 37).

Figure 37. CHANGES IN THE TOWN PLAN OF KARLOVO IN THE mid-1800s, IN THE 1930s AND 2020s



Compiled from: Popov (1967), Archive of the Municipal History Museum, Town plan of Karlovo

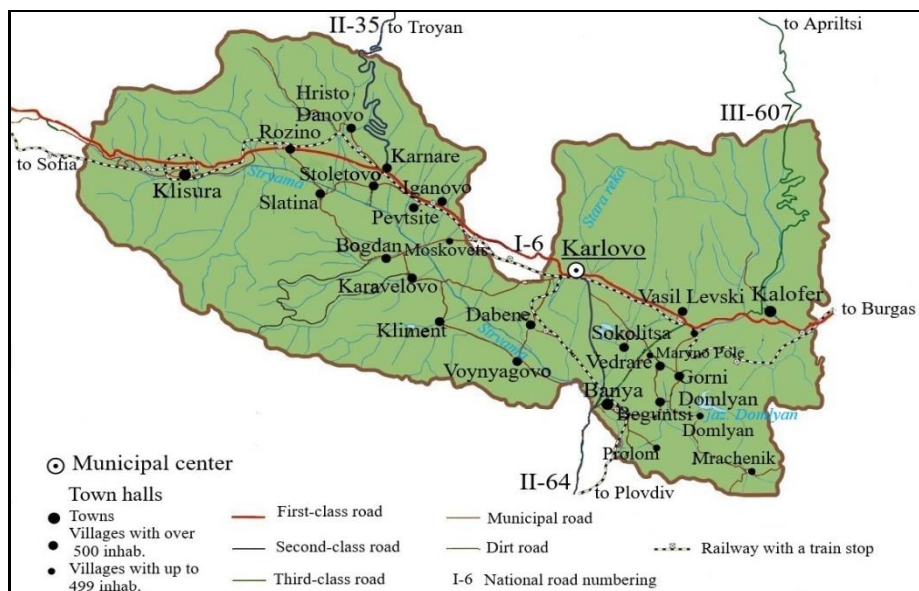
The town grew in the west, south and east. The improvement of the western part was related to the construction of a technical school, a regional hospital, a military department and new neighbourhoods. In the south, utilization of space was to be seen as neighbourhoods were constructed close to the new railway infrastructure and station. They

catered for the growing population of Karlovo as result of the industrialization of the region and the development of the food industry. The development in eastern direction was more minor and slow-paced. New changes in the look of Karlovo followed in the 1960s, the town expanded as a result of the industrialization (and immigration). New factories, administrative buildings, a hospital, schools, kindergartens and creches, WSS as well as social housing for the factories and the military departments were built. An industrial zone was also created in the south-southwest of the town.

The traditional division of Karlovo into Bulgarian and Turkish neighbourhoods gradually stopped being practiced owing to the new housing development. Attention was paid to the recreational spots, the playgrounds and the overall look of the town.

Karlovo Municipality has always been one of the biggest in Bulgaria. Until the separation of Sopot and Anevo in 2003, the municipality covers 1115km² (fig. 38). The lack of other nearby settlements makes it an important administrative, industrial, transport, trade and tourist centre in the district and conditions its socio-economic and military-political importance for the country.

Figure 38. KARLOVO MUNICIPALITY AT THE BEGINNING OF XXI CENTURY

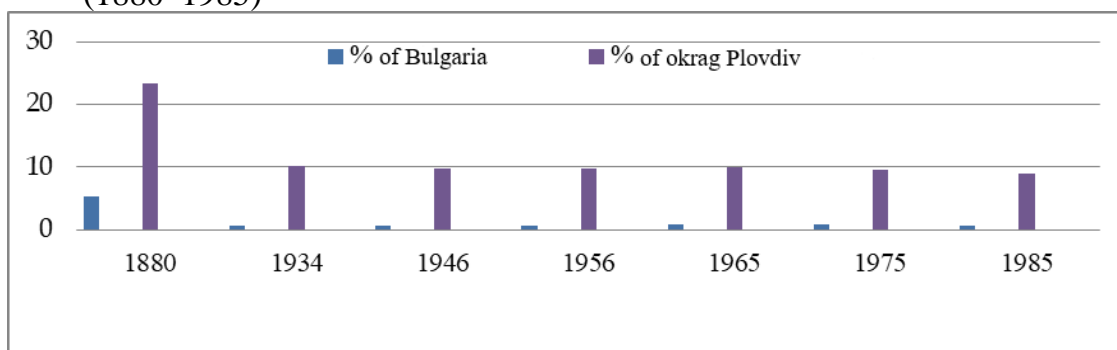


Compiled from: NSI

The Liberation found Karlovo with a changed demographic structure. As a result of the participation of the male part of the population in the wars, after the end of the First World War (and to this day) the numbers of the women in the region prevail.

Before the Unification of the Principality of Bulgaria and Eastern Rumelia, the share of the population in Karlovo county was relatively big both in the region and in the autonomous province. After the Unification the number of the population grew, but at a slower pace. The reason for that lay in its varying territorial scope in the different periods. Despite this, Karlovo remained a municipality with a high demographic potential (owing to the more frequent migration processes) and of economic importance. The relative share of the population in the municipality over that in the country remained the same (around 0,7–0,8%) and over Plovdiv okrag/district (around 9–10%) for the most of the period 1880–1985 (fig. 39).

Figure 39. PERCENTAGE OF THE POPULATION OF KARLOVO COUNTY/ MUNICIPALITY OVER BULGARIA AND PLOVDIV OKRAG/DISTRICT (1880–1985)



Compiled from: Ofitsiyalna..., (1880), Prebroyavane..., (1980), Tsentralno... (1988)

The number of the population in Karlovo was the highest in the 1960s due to the fast industrialization (*table 20*), the immigration from nearby settlements and the increased birth rate in Bulgaria in general.

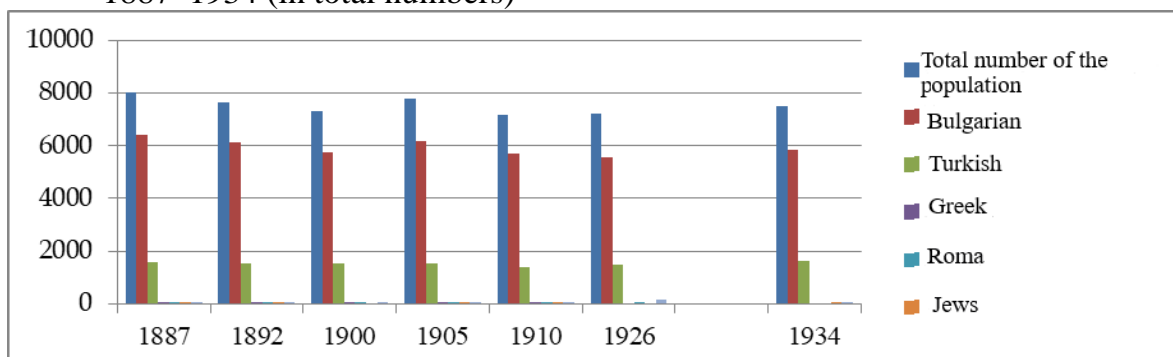
Table 20. INCREASE IN THE POPULATION OF KARLOVO (1946–1985 in %)

1946–1956г.	1956–1965г.	1965–1975г.	1975–1985г.	1946–1985г.
42,0	60,0	26,0	11,3	34,8

Compiled from: Michev, Mihailov etc., (1980), NSI

The changes in the population structures were indicative of the trends in its development. The ethnic structure of the town both before and after the Liberation consisted mainly of Bulgarian, Turkish and Roma people.

Figure 42. ETHNIC STRUCTURE OF THE POPULATION OF KARLOVO COUNTY 1887–1934 (in total numbers)



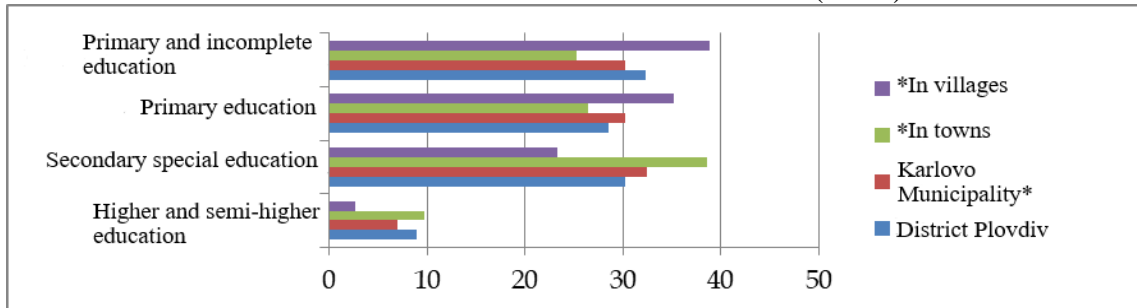
Compiled from: Spirov, (2003), NSI

At the beginning of the 1960s, around 20 families from the Velingrad region immigrated in Karlovo, who are around 200 people today. Another ethnic group with high numbers in the region is the Sarakatsani. At the end of the 1950s around 2000 people settled down in the municipality and their number remains almost the same even to this day. In the 1980s not so big a number of Russian and Ukrainian women married to Bulgarians working in the former USSR settled down in the town.

After the Law on National Education was passed in 1948, primary education was compulsory and free courses for the poorly-educated elderly people were organized. For this reason, only some of the eldest citizens of Karlovo remained illiterate. Data on the literacy rate in district Plovdiv and Karlovo municipality at the end of the socialist period is shown on *fig. 47* (in %). It is evident that the municipality overtook the district in terms of people

with secondary and primary education and that the share of the poorly-educated was smaller.

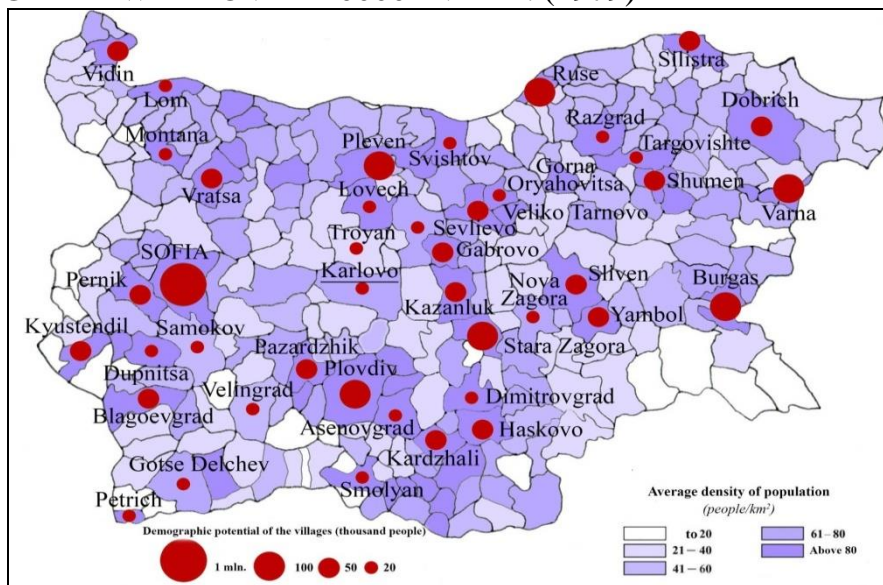
Figure 47. POPULATION IN DISTRICT PLOVDIV AND KARLOVO MUNICIPALITY IN TERMS OF COMPLETED EDUCATION LEVEL (1991) in %



Compiled from: Naselenie..., (1992)

In 1979 Karlovo was in the 38th place among the towns in Bulgaria (fig. 49), however, the population density of the region was under the average for the country despite the positive rate of natural increase. Its readings are lower than the average even after the socialist period.

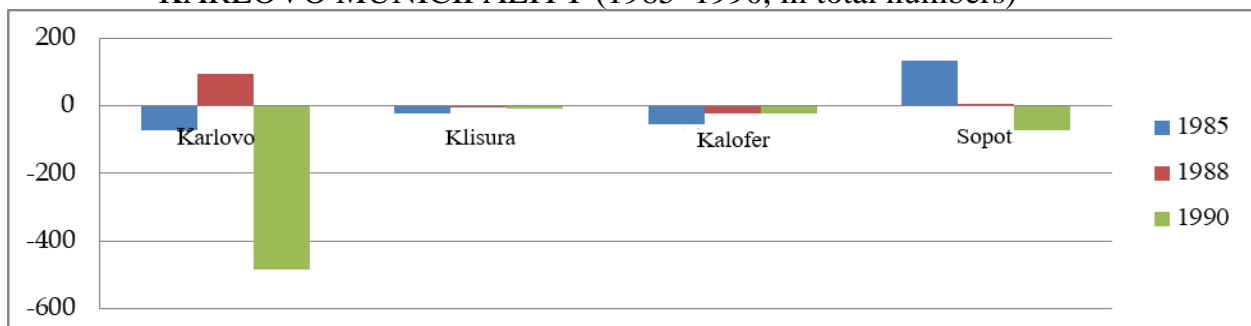
Figure 49. KARLOVO, KARLOVO TOWN SYSTEM AND THE TOWNS IN BULGARIA WITH OVER 20000 INHAB. (1979)



Compiled from: Statisticheski..., (1980)

The net migration rate in the towns in Karlovo municipality was negative at the end of the 1980s (fig. 54), in Sopot, it was only positive until 1989.

Figure 54. NET MIGRATION RATE OF THE POPULATION IN THE TOWNS IN KARLOVO MUNICIPALITY (1985-1990, in total numbers)



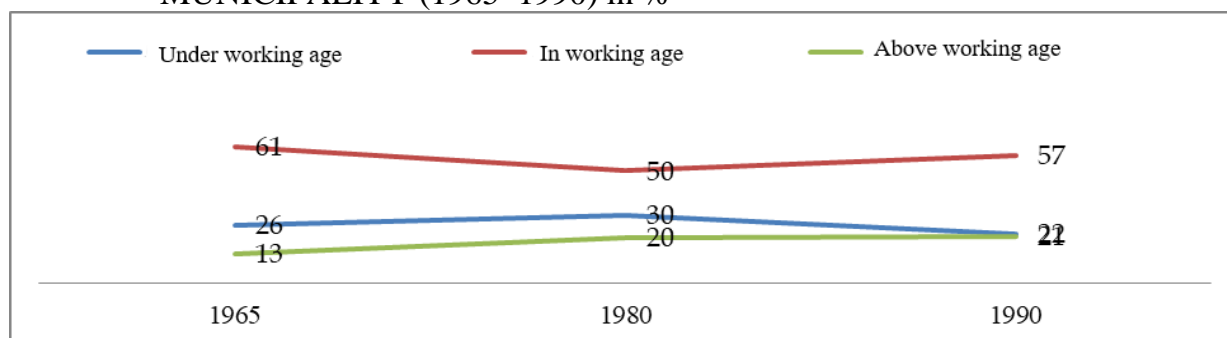
Compiled from: Tsentralno..., (1988), Tsentralno..., (1991), Statisticheski..., (1991)

After the political changes of 1989, a lasting emigration process began which came as a result both of the economic crisis in Bulgaria and of the shutdown of factories in the region and the unemployment which followed. This led to rurbanization towards the nearby villages as well as to emigration of young people in big towns and abroad.

Part of the people in working age, who stayed in villages to live there, commuted daily to Karlovo. The connection of industrialization with commuting in Karlovo municipality is analyzed by Stanev etc. (1980) and Karakashev (1992). According to them, the average distance of Karlovo from the settlements with work migrants was the biggest at the end of the 1980s.

At the end of Socialism, the age structure of the population in the municipality worsened (*fig. 55*), which was a prerequisite for the aging of the population.

Figure 55. POPULATION IN, UNDER AND ABOVE WORKING AGE IN KARLOVO MUNICIPALITY (1965–1990) in %



Compiled from: Rezultati..., (1967), Borisov..., (1983), Statisticheski..., (1991)

In terms of the employment structure in the post-war period, a trend towards a decrease of the share of the employed in agriculture and an increase of those working in the field of manufacturing due to the change in the economic structure was to be observed. Urbanization processes increased parallel to the industrialization in Karlovo county/town system. It displayed higher rates of urbanization for the period (1965–1985) than Bulgaria, however, the opposite process was to be observed at the end of Socialism. The reasons for that were the decreasing birth rates and the negative net migration rate.

In the post-liberation period, until 1990, Karlovo showed spectacular industrial and demographic progress, the municipality developed as one of the biggest in terms of area, economic power and population in the country. The municipal centre Karlovo was an attractive force for people from the surrounding settlements owing to its health, educational, administrative and other services as well as operating factories. These all were stagnant at the end of Socialism and are the reason for the negative trends in the development of the town and the municipality in the last decades.

CHAPTER FOUR. CONTEMPORARY SOCIO-ECONOMIC TRENDS AND PROBLEMS IN THE DEVELOPMENT OF KARLOVO MUNICIPALITY AND ITS ADMINISTRATIVE CENTRE

4.1. SOCIO-ECONOMIC TRANSITION AND CONTEMPORARY PROBLEMS OF THE DEVELOPMENT

The old-fashioned manufacturing methods, the new prices of the raw materials, the lack of economic efficiency etc., are the reasons for the stoppage and the collapse of the

Bulgarian economy after 1989. The total production is not competitive on the international market and as a result, could not be sold. The planned economy in Bulgaria is replaced with market economy after 1989. The transition is difficult and connected with the shutdown of a few factories.

Agriculture, the food industry, mechanical engineering and the textile industry, which are the most enhanced production branches in Karlovo, are the most affected. The closing-down (KTZ, TF „Teodosi Markov“, VRZ, the Can factory etc.) or the greatly decreased production (VMZ, „Bulgarian rose“ JSCo, Meat processing plant etc.) of many of the factories in the municipality have led to it lagging behind economically after 1989. Results from this are the high unemployment rates and the subsequent problems affecting the socio-economic development in the Karlovo region as well as migration processes connected with an outflow of primarily young people towards the big towns or abroad.

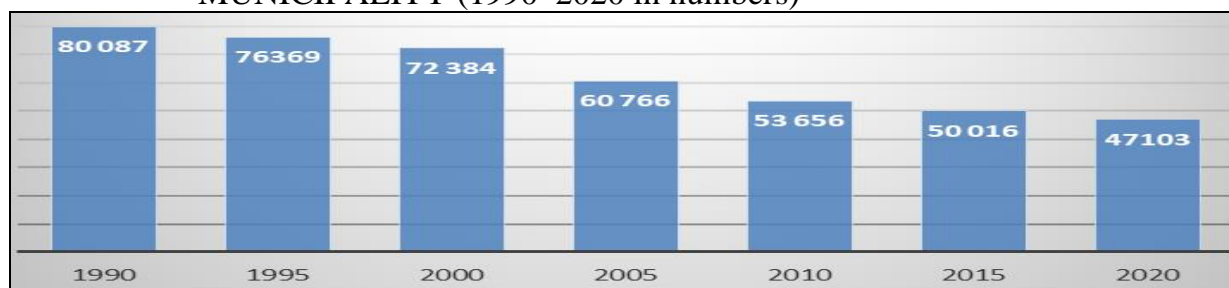
New firms established in Postsocialism in the Karlovo region are: „BAMEKS Metal BG“ Ltd, „IPO“, „SKF“ JSCo etc. A few milk-processing and wine-producing enterprises function in the municipality (Milk factory Karlovo, „Itali – Trifonovi“ PVT LTD, Dairy farm VEDRARE, dairy Karnare, „Polidei – 2“ PVT LTD – Domlyan, Chateau Copsa) as well as more than 15 sewing enterprises.

The big factories (by indicator number of employees) in the region are „SKF“ and VMZ, which are on the territory both of Karlovo and Sopot municipality, the middle-sized ones are „Bulgarian rose“ JSCo, „Polidei – 2“ PVT LTD, „IPO“ PVT LTD, Meat processing plant Karlovo JSCo and nearly all of the rest fall in the category small and microfactories.

There are another two big employees in Karlovo municipality, who are in the public field. The first one is the Municipality itself and the second one is 61 Stryamska Mechanized Brigade.

After 1989 alterations in the structure of the population of Karlovo municipality (as well as in the country) were made. Its numbers fall permanently (*fig. 63*) and the average age increases which leads to aging of the population.

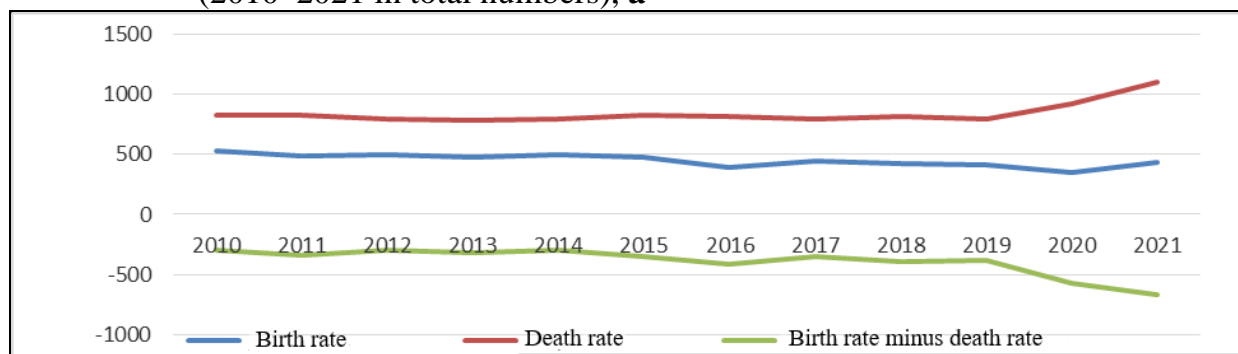
Figure 63. CHANGES IN THE NUMBER OF THE POPULATION OF KARLOVO MUNICIPALITY (1990–2020 in numbers)



Compiled from: Republika..., (1992), PIDM Karlovo, Rayonite..., (2022)

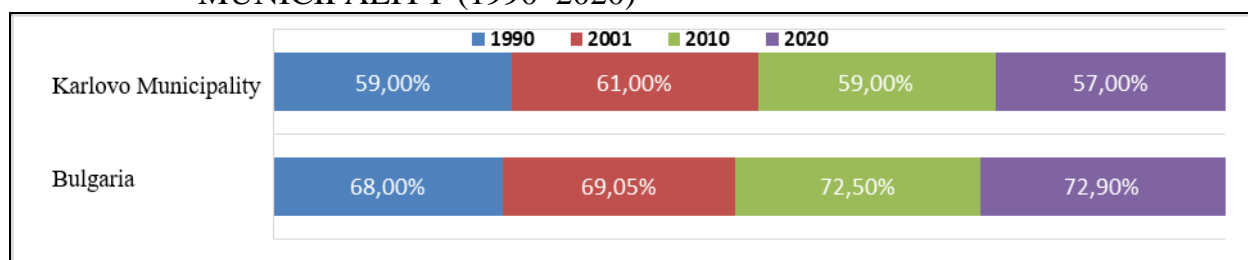
The rate of natural increase is negative in the last two decades (*fig. 65, a*). There are only four towns in the municipality and therefore, the urban population numbers have always been lower than the average for the country (*fig. 66*) and they continue to fall. The population density of the municipality is lower than the average for the country and the district. The age population structure in the municipality is worsening (*fig. 70*).

Figure 65. NATURAL POPULATION CHANGE IN KARLOVO MUNICIPALITY (2010–2021 in total numbers), a



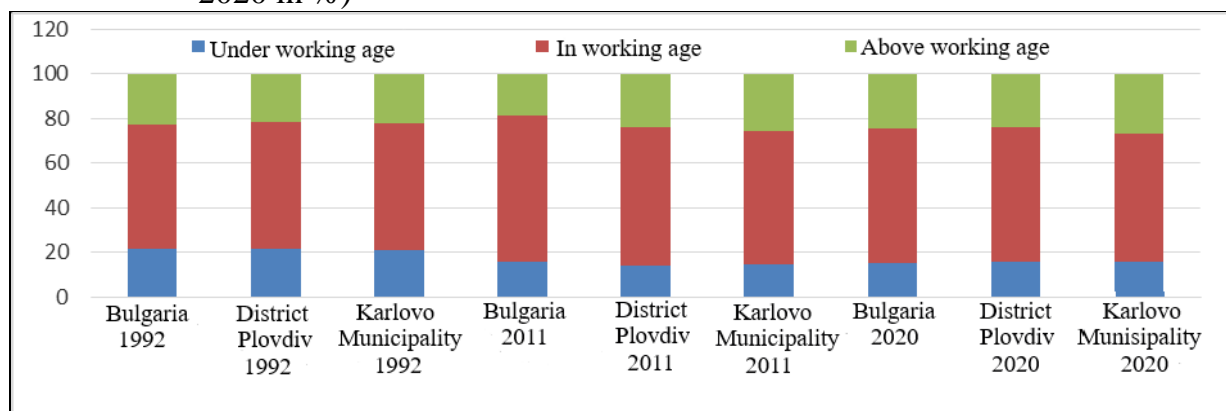
Compiled from: MDP (2007–2013 and 2014–2020), PIDM Karlovo, NSI

Figure 66. % URBAN POPULATION IN BULGARIA AND KARLOVO MUNICIPALITY (1990–2020)



Compiled from: NSI

Figure 70. POPULATION IN, UNDER AND ABOVE WORKING AGE IN BULGARIA, DISTRICT PLOVDIV AND KARLOVO MUNICIPALITY (1992, 2011 and 2020 in %)



Compiled from: NSI

In the years after 1989, changes could also be observed in the ethnic composition of the population in the municipality. Data about it is available after the censuses in 1992, 2001, 2011 and 2021. The numbers of the Bulgarians decreased with 14% between 1992 and 2021, those of the Roma ethnicity, however, increased with almost 90%. The main reason for these changes is the low birth rate among Bulgarians and its increase among the Roma. Another problem is the emigration of young qualified cadres, the unstable economic situation, the shrinking of job places etc. The demographic indicators analyzed offer a full idea about the state of the population in Karlovo municipality in the last 30 years, they also highlight predictions about and trends in its future development.

4.2. ECONOMIC, POLITICAL PROCESSES AND ELECTORAL BEHAVIOUR

The economic processes in Karlovo municipality are directly connected with the overall economic development in Bulgaria, YTR and district Plovdiv. Important for the development of Karlovo municipality are European corridors IV and VIII, „Trakiya“ motorway, first-class roads I-6 (Sofia–Burgas) and I-5 (Ruse–Kardzali) as well as their railway spatial analogues.

The geographical passport of Karlovo municipality is presented in *table 30*. In one of the biggest area-wise municipalities in the country (1%), 0,68% of the country's population creates only around 0,70% of GDP. Indicative for that is the small number of factories in the municipality which leads to an incomplete utilization of the resources available and problems with the growing unemployment in it (when the value of the indicator decreases). The insufficient agricultural areas and arable lands, the generation of energy, DMA, the transport security, the number of factories, the lack of medical personnel etc., could be defined as deficits in the municipality. The specialized productions are connected with the traditional for the region agricultural productions (roses, lavender) as well as with the ones enhanced in the last years (buffalo-farming, tritcale etc.).

Table 30. GEOGRAPHICAL PASSPORT OF KARLOVO MUNICIPALITY

Indicator	% of Bulgaria
Dessert vines area	0,02
Agricultural area	0,07
Generation and distribution of electrical and thermal energy	0,07
Corn for grain area	0,07
Wheat area	0,15
Sunflower area	0,15
Direct market access	0,17
Transport, storage and post services	0,20
Cherry area	0,20
Water delivery, sewage services, waste management and reconstruction	0,21
Construction	0,21
Manufacturing production	0,27
Peach area	0,28
Number of the medical professionals	0,33
Third-class roads	0,36
Arable lands	0,37
Net migration rate	0,37
Number of immigrants	0,41
Number of factories	0,42
Number of emigrants	0,42
Agriculture, forestry and fishing industry production	0,43
Water currents and water areas	0,47
Number of the beds in the places for accommodation	0,47
Number of the settlements	0,52
Number of students	0,53

Medical institutions – number of beds	0,59
Hotel management and restaurant-keeping	0,60
Number of the electoral wards	0,61
Number of the employed	0,62
Potato area	0,63
Apple area	0,63
Area of the settlements and other urbanized territories	0,64
Population in working age	0,65
Room revenue	0,66
Number of the voters in 2021	0,66
Population under working age	0,67
Population	0,68
GDP	0,70
Number of the community centres	0,72
Municipal transport network	0,73
Population above working age	0,74
Pear area	0,76
Transport and infrastructure area	0,76
Number of the town halls	0,76
Housing stock area	0,84
Second-class roads	0,90
Territory	0,94
Number of the unemployed	0,97
Number of the accommodation places	1,15
Forest lands	1,39
Pepper area	1,39
Number of the registered unemployed up to 29 years old	1,66
Tomato area	1,74
Vineyard area	1,75
Plum area	1,76
Number of the goats	1,76
Watermelon and melon area	1,95
Number of the registered unemployed for more than 1 year	1,99
Number of the cattle	2,77
Lavender area	2,92
Number of the sheep	3,54
Triticale area	6,73
Number of the buffaloes	9,41
Oil-bearing rose area	13,97

Compiled from: PIDM Karlovo; Rayonite..., (2022); <https://www.mzh.government.bg>

The Secondary sector of economy has a leading role in the municipality followed by the Tertiary and the Primary. The Primary is presented mostly by agriculture. It has a horticultural-animal husbandry structure (2:1). The agricultural crops which form a big part of the overall for the country are: roses (14%), triticale (6,73%), lavender (2,92%), watermelons and melons (1,95%) etc. A big share for the animal husbandry production comes from buffalo-farming (9,41%), sheep-farming (3,54%), cattle-farming (2,77%, *table 30*) etc.

The Secondary sector has the biggest share in the production and in the number of the employed in the municipality. The biggest turnover comes from the mechanical engineering and metalworking factories, the food industry, trade, construction, transport and services etc.

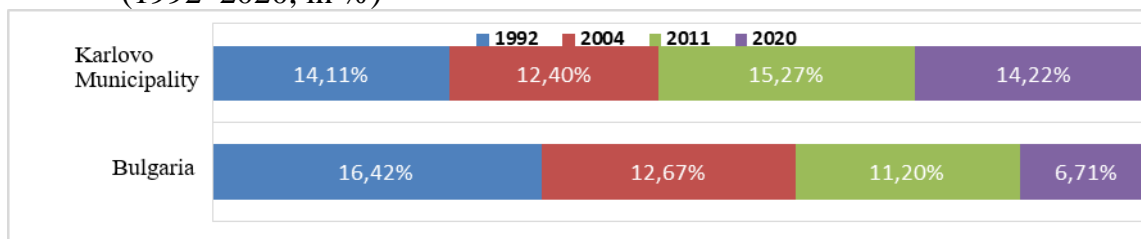
30% of the factories in Karlovo municipality belong to the Tertiary sector. It provides around 9% of the produce and included in itself around 17% of the employed in the period 2014–2018. Trade is presented with various shops and warehouse bases. There are buses to all of the settlements in the municipality and to nearby Sopot municipality, however, the public transport is quite infrequent and this is one of the main problems the people in the region face.

There are attractive tourist resources available in the Karlovo region. Karlovo belongs to the tourist region „Rose Valley“. Those resources are not used efficiently in Karlovo municipality. Professional classes aiming to prepare cadres for the tourism industry are introduced in some schools.

61 Stryamska Mechanized Brigade also plays an important role in the Tertiary sector. The other branches in the service sector with the exception of healthcare meet the needs of the population in the municipality.

The main obstacles for agriculture in Karlovo municipality are both the characteristic for the country decrease in some agricultural productions, insufficient finances and investments, qualified cadres etc., and the lowering of the share of the typical for the municipality productions. A result of them is joblessness, which is stably high in the municipality unlike in the country (*fig. 77, b*). The unemployed in the municipality are around 1% of the unemployed in Bulgaria with a trend for an increase in long-term unemployment among young people aged up to 29.

Figure 77. UNEMPLOYMENT IN BULGARIA AND KARLOVO MUNICIPALITY (1992–2020, in %)



Compiled from: NSI, <https://www.az.government.bg/bg/news/view/12-67-e-ravnishteto-na-bezrabortica-za-2004g-615/>, PIDM Karlovo

In 2017 the Institute for Market Economy divided the territory of the country into „economic centres“. Karlovo municipality is part of economic centre „Sopot“ (together with Sopot municipality). A key feature is that the core (Sopot municipality) has less population than the periphery (Karlovo municipality) which conditions the high daily commuting from Karlovo to Sopot municipality (around 12–13%, *Ikonomicheskite...*, 2017).

Industrial zone „Karlovo“ is part of „National Company Industrial Zones“ Ltd. It is expected that it will achieve direct economic growth which expresses in „increase in the local labour employment, rise in the income of the local population, increase in the influx of direct and indirect taxes for the municipality and the country...“ (*Kontsepsiya...*, 2020).

The people from Karlovo have always showed a big voter turnout. It is bigger in the municipality than in Bulgaria in the first round of all of the regional elections (1995–2019). In the regional elections after 1995 BSP, SDS, DPS and since 2007 – GERB are in the leading positions in Karlovo municipality.

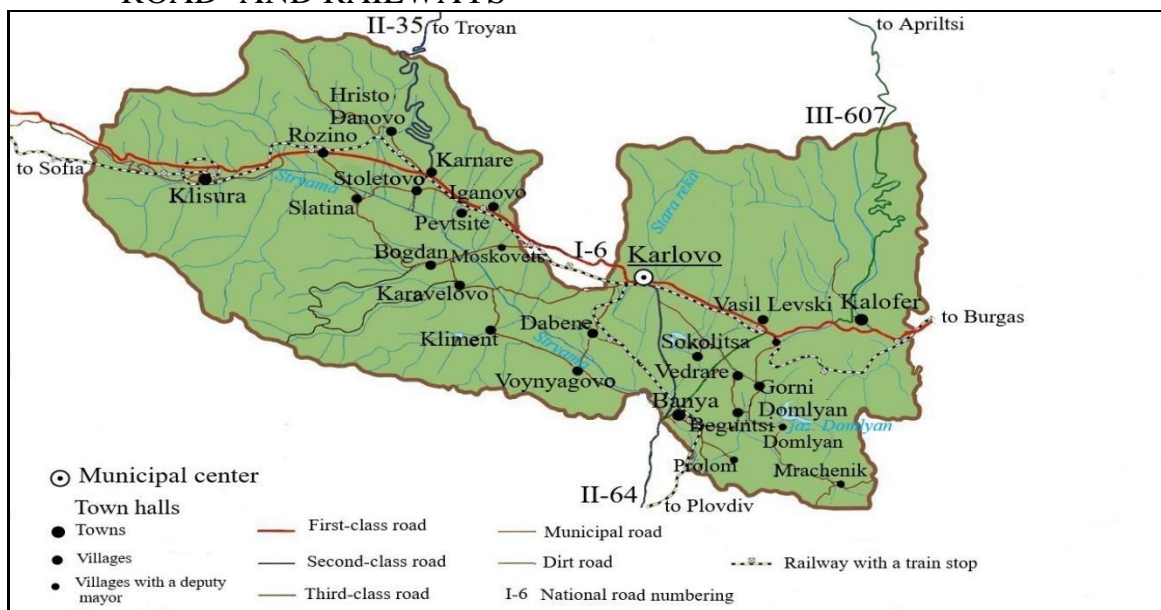
After analyzing the reasons for the migration processes in Karlovo municipality, it could be concluded that there is no big relation between them and the parties, which constitute the local government in Karlovo municipality. A deciding factor for these processes is the government and the socio-economic situation in the country.

4.3. MUNICIPAL SETTLEMENT NETWORK AND TERRITORIAL STRUCTURE

According to the in 2019 updated National concept about spatial development, Karlovo municipality falls in the group of the medium urbanized. The municipality is situated on two secondary urbanization axes Karlovo – Plovdiv – Asenovgrad – Smolyan – Rudozem and Sofia – Karlovo – Kazanlak – Tvarditsa – Sliven – Burgas. Connections with Northern Bulgaria are realized through the passes Shipka (with district Gabrovo) and Troyan–Karnare – fig. 87 (with district Lovech). More convenient but remote are the Pass of the Republic, the Hemus motorway etc.

According to the Interim report on the implementation of the national strategy for regional development for 2012–2022, Karlovo is one of the four towns with population over 20000 in YTR, which supplement and balance the district centres. Karlovo municipality still has not drawn a General structural plan (GSP). Parts of it are published in other documents. According to the predictions in GSP, Karlovo will become a main centre on the territory of the municipality and secondary centres will be Banya, Kalofer, Klisura and Karnare village.

Figure 87. SETTLEMENT NETWORK IN KARLOVO MUNICIPALITY WITH MAIN ROAD- AND RAILWAYS



Compiled from: <https://www.karlovo.bg/>

Landscaping of the settlements in Karlovo municipality is soon to happen. New high-technology industrial zones will be created in the south, west and southeast of the town

(Doklad..., 2017). The geographical location of Karlovo municipality is the reason why it stands out as an important road and railway junction.

The settlements in the municipality are completely electrified, most of them also have new plumbing. All populated places have access to Internet and mobile network operator coverage. A few main area types depending on the way of their continuous use could be found on the territory of the municipality and they are divided in three functional types (general purpose areas, agricultural areas, protected and disturbed areas).

4.4.MAIN PLAN DOCUMENTS AND POLITICS FOR DEVELOPMENT OF KARLOVO MUNICIPALITY

The proper management and development of the municipalities in Bulgaria is connected with the preparation and implementation of plan documents in accordance with the „*current goals, principles, regulations and procedures for conduction of regional politics within the EU*“ (Metodicheski..., 2011). The main plan documents for the development of Karlovo municipality are presented in *table 40*. Most of them cover the problems connected with the migration processes in the municipality and their negative consequences. The migration topic is not to be found only in the documents related to energy efficiency in the municipality and the tourism and community centres programs.

Table 40. MAIN PLAN DOCUMENTS OF KARLOVO MUNICIPALITY

Plan documents for the development of Karlovo municipality	Period/year
Municipal development plan of Karlovo municipality	2007–2013
Strategy for the development of social services in Karlovo municipality	2010–2015
Program for management and development of Karlovo municipality	2011–2015
Municipal development plan of Karlovo municipality	2014–2020
Integrated plan for urban restoration and development of Karlovo	2014–2020
Report on the implementation of a program for management and development of Karlovo municipality	2015–2019
Report evaluation of the degree of impact of the implementation of the general structural plan of Karlovo municipality on the subject and goals for conservation of the protected areas	2017
Program for management and development of Karlovo municipality	2020–2023
Short-term program for stimulation of energy use from RES and biofuels in Karlovo municipality	2020–2023
Plan for integrated development of Karlovo municipality	2021–2027
Program for the development of community centre work on the territory of Karlovo municipality	2022
Program for the development of tourism on the territory of Karlovo municipality	2022
Short-term program for energy efficiency in Karlovo municipality	2022–2025
Short-term program for stimulation of energy use from RES and biofuels in Karlovo municipality	2022–2025
Long-term program for energy efficiency in Karlovo municipality	2022–2031
Long-term program for stimulation of energy use from RES and biofuels in Karlovo municipality	2022–2031
General structural plan of Karlovo municipality	In preparation

Compiled from: <https://www.karlovo.bg/>

The first Municipal development plan of Karlovo municipality (MDP) is for the period 2007–2013. It includes both a detailed description of the municipality, its strong and weak sides, opportunities and risks (SWOT analysis), look and priorities for development in the different aspects, and an analysis of its condition and the measures for achieving economic growth.

The next MDP is for the period 2014–2020. It is a continuation of the previous one, however, includes additional information about the in 2010 passed strategy of the EU „Europe 2020“, which requires the connection of strategies and politics for the achievement of sustainable and incorporative economic growth.

After 2021 MDP are replaced with a Plan for integrated development of municipality (PIDM). The advantages and the development potential of the municipality, including the look, goals and priorities for development connected with the ambition for better quality of life for the population and sustainable territorial development are evaluated in PIDM Karlovo. PIDM reports on the decisions made in GSPM. The look of Karlovo municipality according to PIDM is: *„Karlovo municipality – harmonic territorial community with sustainable complex balanced development, investment attractive, with preserved nature, conserved cultural heritage and positive socio-economic trends“*. In the document is indicated that the look is also connected with GSP of the municipality, however, owing to the lack of such, it is rather inexactly implemented. For the time being, part of the other elements in relation with the look still have not been executed – for instance, there is insufficient investment, the creation of economic zone – Karlovo has not began yet, some emblematic town buildings have not been restored etc.

A Program for management and development (PMD) is prepared for every period of management of a municipality, whose implementation is reported with a written record at the end of the mandate. The Report for execution of PMD of Karlovo municipality 2015–2019 includes an analysis of the accomplished tasks and priorities of the previous local governmental mandate in Karlovo municipality. According to this report the municipal administration continues the work for achievement of the strategical goal stated in PMD of Karlovo municipality 2011–2015.

The current PMD of Karlovo municipality 2020–2023 includes the main goals, priorities, terms and the work for its implementation etc. It is a continuation of the same document for the previous period. According to PMD the municipality must continue developing like an attractive place for living and being a model for good management based on innovation and trust.

The Short-term (2022–2025) and the Long-term (2022–2031) programs for energy efficiency are created in accordance with the strategy for development of the municipality.

The Report evaluation of the degree of impact of the implementation of GSP of Karlovo municipality on the subject and goals for conservation of the protected areas is an addendum to the Report on ecological evaluation of GSP. Its main goal is determination and evaluation of the possible impacts of the implementation of GSP of Karlovo municipality on the protected zones „Reka Stryama“, „Sredna gora“ and „Tsentralen Balkan buffer“.

The Program for the development of community centre work and the Program for the development of tourism on the territory of Karlovo municipality are prepared annually. All plans and programs are interconnected. They are prepared based on the already passed documents. They are published on the site of Karlovo municipality.

4.5. LOCAL GOVERNMENT AND MIGRATION PROCESSES IN KARLOVO MUNICIPALITY–DEMOGRAPHIC AND CULTURAL POLITICAL ASPECTS

The current mayor of Karlovo municipality was elected from the local coalition „Obedineni za nashata obshtina“ for the first time in 2003. At present, he is in his 4th mandate (with a break from 2007 to 2011). The municipal council in Karlovo consists of representatives from 7 political parties and coalitions. The biggest share of the votes receives PP GERB, followed by PP BSP for Bulgaria and the Local coalition PP SDS. One of its primary duties is approving the structure of the municipal administration which is suggested by the Mayor of the municipality. Its current structure in Karlovo municipality could be studied on <https://www.karlovo.bg/section-200-administraciya.html>.

In 2021 „Forum Grazhdansko Uchastie“ did a survey with a „focus-group“ of representatives of the local government, citizens and NGO from Karlovo. The goal was preparation of a Report on the Index of civic engagement in Karlovo municipality – 2021. The Report includes 3 fields for evaluation together with the given indicators, conclusions, examples and recommendations given a mark from 1 to 6. The total mark of Karlovo municipality is 3,40 and is in 6th place among the evaluated municipalities (<https://index.fgu.bg/reports/charts>).

There have always been complex migration processes in the Karlovo region for different reasons. The reasons for internal migration (within the municipality) are related primarily to commuting or travelling to educational institutions in Karlovo or Sopot, this means that they are influenced by the creation of big industrial factories and secondary schools. According to the census of 2021, 46% of the employed in Karlovo municipality commute daily (which is twice higher than the average for district Plovdiv, NSI).

As a result of the opening of the borders of the country for travelling and the difficult economic situation after 1990, the net migration rate in Karlovo municipality is negative. Only around 2000, it was positive for a short time and after that it became negative again (*table 43*).

Table 43. NET MIGRATION RATE IN KARLOVO MUNICIPALITY (2000–2021 in total number and genderwise)

Net migration rate			
year	males	females	total
2000	6	76	82
2005	-132	-90	-222
2010	-254	-248	-502
2015	-129	-114	-243
2020	69	44	113
2021	17	-19	-2

Compiled from: MDP Karlovo (2007–2013 and 2014–2020), PIDM Karlovo, NSI

The situation was most problematic in 2010 when 502 people emigrated from the municipality and this was also the period with the highest unemployment rate in it—over

15%. After 2015, the economic situation in the municipality improves and this leads to decrease in emigration.

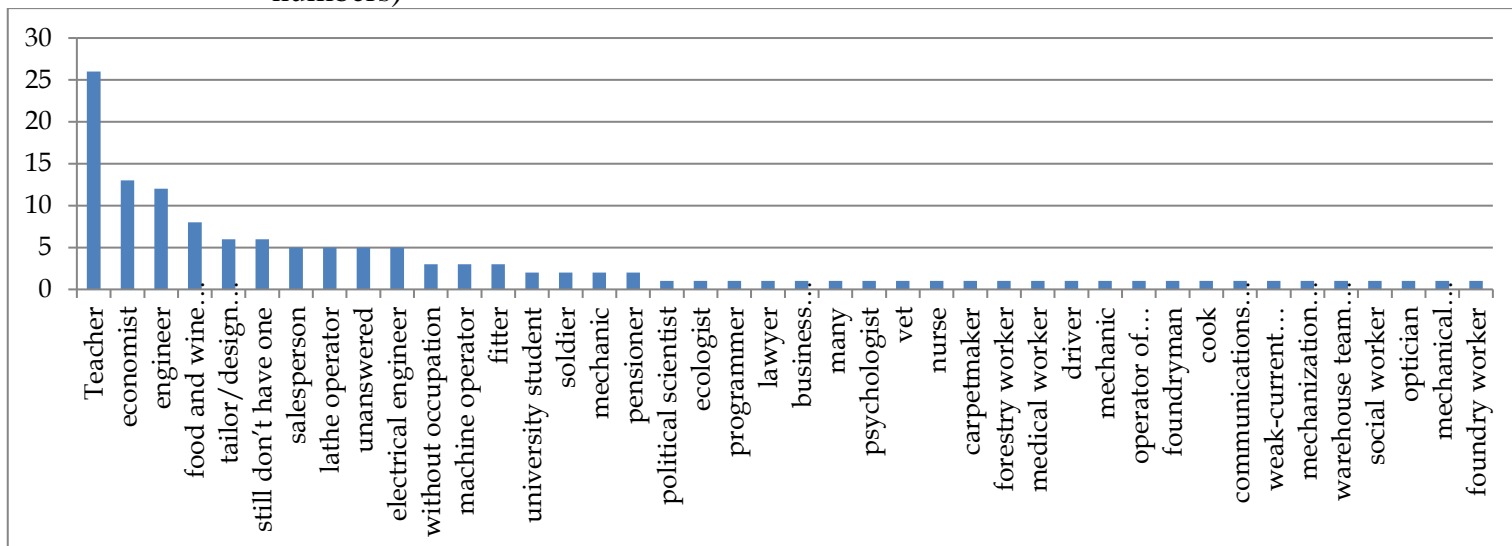
The external migration out of Karlovo municipality is relatively low at the moment and its rate is close to 0 (*tab. 43*). This could be viewed as an indication of improved living and working conditions.

In order to study the public opinion on topical for the region issues and topics connected with the quality of life and management as well as the emigration inclinations of the population and the reasons for that, two opinion polls have been conducted. In the first one, the respondents are aged between 18 and 82 and in the second one, the answerers are 18-19 years old. The first survey is a poll in which 133 people from Karlovo and Sopot municipality participated (90% of the surveyed are from Karlovo municipality and 10% from Sopot municipality). From the postliberation period to 2003 the two municipalities were connected and even today daily travels are realized. This is the reason why some of the respondents live in Sopot municipality. 107 are from towns and 26 from villages in the municipality. The results from the polls are similar to the recommendations and conclusions in the Report on the Index of civic engagement in Karlovo municipality. The conclusions drawn are presented below.

RESULTS AND ANALYSIS OF THE PERSONAL OPINION POLL CONDUCTED AMONG CITIZENS FROM KARLOVO AND SOPOT MUNICIPALITY IN 2021

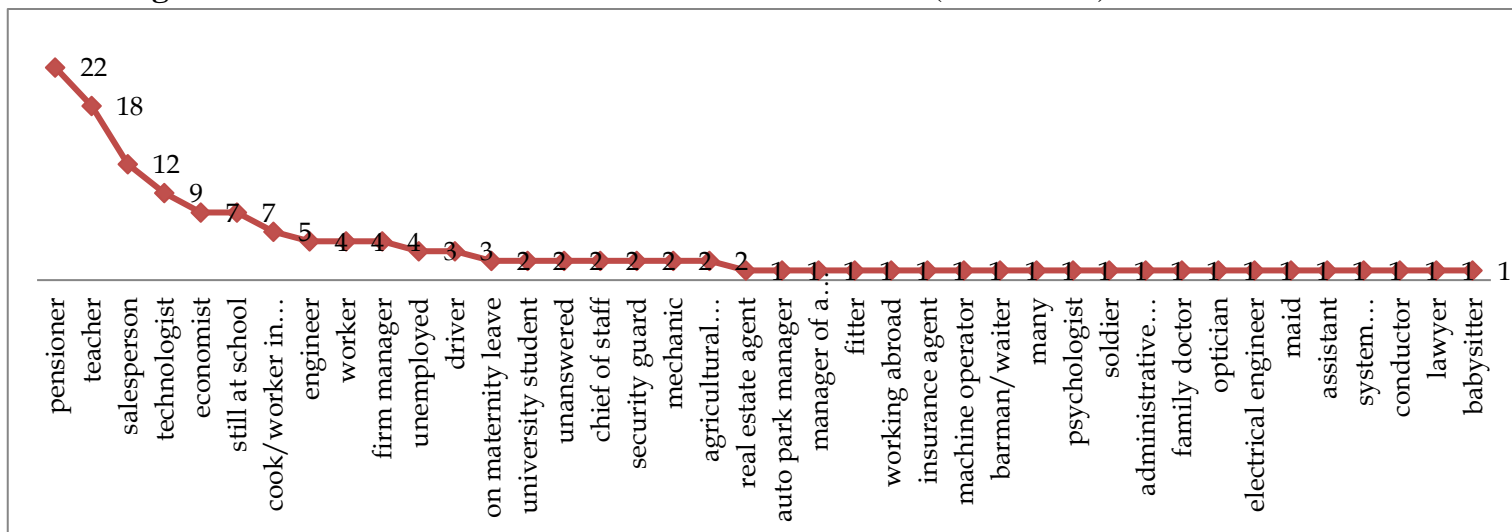
1. **You are: male/female** The ratio between the males and females is 34:66%.
2. **When were you born?** The biggest part of the respondents was born between 1961 and 1970 (31%) and the smallest – those who have just reached age of majority – 7%.
3. **In which period of your life do you think you lived the best?** Two periods are given as examples for good life periods – after 2010 (35%) and between 1981 and 1990 (27%). The contemporary period (after 2010) is the best according to the young people.
4. **Which education level do you have?** 95% have secondary or higher education. Only 3% of the participants have no profession.
5. **What is your occupation according to the education you have?**

Figure 93. TABULATION OF THE SURVEYED CITIZENS BY OCCUPATION (in numbers)



6. What do you do for a living?

Figure 94. THE JOBS OF THE SURVEYED CITIZENS (in numbers)



By comparative analysis of the answers of questions 5 and 6 (fig. 93 and 94) a relative correspondence between the acquired and practised professions is noticeable.

7. Which is the most important event from the last 2-3 decades which has led to positive changes in the development of Karlovo and Karlovo municipality?

The answers to question 7 are more than one which makes the total number bigger (147). Around 1/3 of the respondents cannot make a decided evaluation or believe that there are no positive events for the development of the municipality. The creation of parks, playgrounds, the town enhancement, the existence of a pedestrian zone, the reparations of schools and kindergartens, the keeping of the military department and VMZ play a crucial positive role for the development of the town according to over 30% of those who participated. For another 14%, tourism and traditions are the base for the positive changes in the town and the municipality.

8. Which is the most important event from the last 2-3 decades which has led to negative changes in the development of Karlovo and Karlovo municipality?

The answers of question 8 are also indicative. The share of those unable to make a decided evaluation remains overall the same – 1/3. Some of the main problems highlighted are the shutdown of factories, the problems with transport and healthcare, unemployment, emigration of young people, the aging of the population, the decreasing birth rate among the Bulgarians, the closure of schools in villages etc.

9. In which settlement have you lived the longest in the last 20 years?

There are surveyees from the four towns in Karlovo municipality, from Sopot and from some of the biggest villages in the municipality – V. Levski, Dabene, Rozino etc. Around 9% live in the cities Sofia and Plovdiv as they left the municipality recently (they are studying or have found a better-paid job).

10. Give examples of ONE, TWO or THREE public figures who, from your perspective, have a good influence on the look and development of Karlovo and Karlovo municipality. According to 42%, there are no public figures who influence the look of the municipality positively. The current Mayor of Karlovo municipality Dr Kabaivanov (14,30%) and the parliamentary representative Veska Nencheva (10%) stand

out among the political figures. 13% believe that the public figures important for the town are from the time of the Revival – Vasil Levski, Evlogi and Hristo Georgievi, Dr Bogorov, Hristo Botev.

11. Do you need to travel outside of your place of residence daily? If yes – for what reason and at what distance? The majority of the respondents travel to their workplaces or to study between 5 and 30 km daily. Some of the travelling need health services which they could receive in the municipal or district centre.

12. How do you evaluate the contemporary condition of the settlement, street and the home where you live in comparison to others?

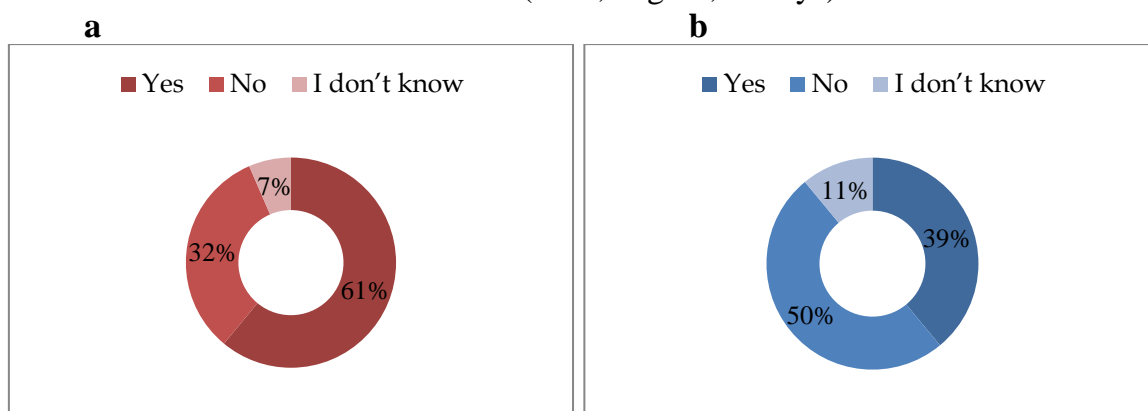
The contemporary condition of the settlement, street and the home is evaluated almost equally as positive or negative (around 40%) and 20% cannot make a decided evaluation.

13. How do you evaluate the state of the public services (transport, electrification, WSS, administrative services, healthcare, education, trade and culture)? By studying the answers, it could be concluded that the percentage of those unable to make a decided evaluation and those who evaluate the state of the public services as positive is equal (22% each). 56% are flatly unhappy with their state and more than 20 concrete suggestions and measures for change are given.

14. Would you immigrate in a nearby municipality, in Plovdiv, Sofia or another district centre? (if yes – where?) Over 2/3 of the participants would not change their place of residence. Around 33% believe that it would be better for them to move to a bigger settlement. The most preferred is the district centre Plovdiv (according to 62% of those who reply affirmative), followed by Sofia (18%). Despite the negative opinion of the surveyees in relation with the management and the services in the municipality, the conclusion that people over 40 would not leave their place of residence unlike the bigger part of the younger generation who consider options for change could be drawn.

An unofficial survey of opinion has also been conducted among 49 youngsters aged 18-19 (finishing their secondary education level), from whom 18 boys and 31 girls. To the question “Would you emigrate from Bulgaria and why?” the majority of them reply affirmatively. It makes impression that 61% of the girls would leave the country, however, the percentage of the boys is 39% (*fig. 95, a – girls, b – boys*).

Figure 95. EMIGRATION INCLINATIONS AMONG THE YOUNG PEOPLE IN KARLOVO MUNICIPALITY (in %, a–girls, b–boys)



The predominant reasons for emigration are the economic ones for both of the genders, however, girls also pay attention to the better education and healthcare abroad. The United Kingdom and Germany stand out as the most attractive places for living. Only 15 of the youngsters who participated in the survey firmly believe they would stay in Bulgaria. The

reasons are their families and friends, the beautiful nature, the job opportunities in Bulgaria etc. After comparing people's migration inclinations in the two surveys, it is noticeable that in contrast to the older citizens in the municipality, the bigger part of the young display an inclination for a long-term emigration not only from the municipality, but also from Bulgaria.

The analysis of all of the conclusions made proves the Working hypothesis indisputably. The course and directions of the migration processes in Karlovo municipality and its socio-economic development during the different periods are connected and interdependent. During economic growth, the migration processes in the municipality are towards the municipal centre and lead to its growth, and during an economic crisis, the emigration towards district centre Plovdiv, towards the capital city and abroad increases. Proof of that is the migration inclinations of the surveyed citizens.

CONCLUSION AND SCIENTIFIC CONTRIBUTIONS

Karlovo municipality is one of the biggest area-wise in Bulgaria. During the different historic periods, its territorial scope varied but the municipality has always been of importance as an administrative and economic centre in district Plovdiv and the country. Main roadways and railways cross its territory.

The research on the socio-economic and demographic development as well as the migration processes in Karlovo and the municipality in the present study makes it possible to draw the main reasons which led to their current condition. This gives a base for conclusions and predictions about the future development of the region.

Municipal centre Karlovo came into existence on the territory of ancient settlements, however, it developed after the Ottoman invasion in XIV century. After Karlovo was found, it received trade status and gradually became a centre of attraction for population. The town played a crucial socio-economic role even during the Revival. This importance became even greater in the next periods and the region was at its economic peak during Socialism.

A lot of industrial factories were built in the town and the municipality and it became one of the leading in terms of the amount of industrial production and the number of the employed in the district and the country. The main productions were in the mechanical engineering branch (including the military industry), the chemical, light and food industry. The development of the industry after the Second World War was connected with the creation of jobs and this is the reason for immigration of population from the nearby settlements to the municipal centre Karlovo.

After the socialist period and the transition to market economy in the country, a lot of enterprises in the municipality were shut down or restructured. This process led to problems in the socio-economic development and deepened the unemployment problem in Karlovo and the municipality which created prerequisites for emigration.

At present, the small and middle-sized factories predominantly in branches like mechanical engineering, the light and food industry as well as a number of microfactories are typical for the municipality. The big factories are two in the Secondary sector (VMZ and SKF) and two in the service sector (Karlovo Municipality and 61 Stryamska Mechanized

Brigade). The creation of industrial zone „Karlovo“ lies head and this will lead to an enhancement of the look of the municipality and to an improvement of the living standard.

There is a wide variety of natural and anthropological tourist resources in Karlovo municipality, however, the accommodation opportunities are inefficiently used.

The high unemployment rate is a result of the economic lag of Karlovo municipality in the last few years. Unlike the country in which the unemployment rate was decreased to (6,7%) in 2020, it is still high in the municipality – (14,2%).

The social and economic uncertainty lead to an unstable political situation. The electoral inclinations of the people are also the result of this. The political leaders in the municipality after 1990 are the parties SDS, BSP, DPS and since 2007 – GERB.

The migration processes and the emigration inclinations of the people in the municipality are connected with the economic problems there. The net migration rate is negative after 1990 with the exception of 2020. The drop in the numbers of the young population, in the living standards and the income, the high unemployment rate, the healthcare and transport problems in the municipality etc. increase the net migration rate.

The main reasons for migration from the municipality and Bulgaria are the family ones, the uncertainty of the young people about their job opportunities in Bulgaria, the unstable political and economic situation in the country, the strive for better labour and living conditions, healthcare and education etc. Destinations in Bulgaria attractive for the emigrants from Karlovo municipality are district centre Plovdiv and the capital city as well as developed European countries—the United Kingdom, Germany, Austria, Spain, France etc.

The main problems of the population in Karlovo municipality, which are highlighted in the opinion polls conducted, are connected primarily with the condition of the public services. Such are WSS, healthcare, transport, electrification, town cleanliness, the shutdown of factories in the region, unemployment mainly among the young, the closure of schools in the villages, the lack of funding for the smaller settlements etc.

The positive changes mentioned by the population are related to the town enhancement (the creation of parks, playgrounds and sports grounds), the development of tourism, the revival of traditions, the management of the municipality, the keeping of VMZ and the military department, the access to big chain stores.

The contemporary problems of the population of Karlovo municipality are related to the insufficient job places and the relatively low salaries as a result of which emigration from the municipality is to be observed. This confirms the working hypothesis and proves the connection between the socio-economic development and the migration processes in the municipality. Finding solutions to those issues is a way to keep the young people in it.

Based on the main conclusions about the processes of the socio-economic and demographic development of Karlovo municipality and the connected with them problems and migration inclinations of the population, the scientific contributions of the present study could be proven.

CONTRIBUTIONS OF THE DISSERTATION

- Cause-and-effect relationships between the socio-economic regional development and the migration of the population have been established;
- The development of Karlovo as a municipal centre has been studied and the directions of the town's growth after the middle of XIX century have been visualized;
- A geographical passport of Karlovo municipality as a base for analysis and evaluation of its contemporary condition by main indicators has been created;
- The socio-economic and demographic development of Karlovo and the municipality and their relations to the migration inclinations of the people in the different periods have been studied;
- Opinion polls in relation with topics and problems connected with the quality of life and the municipal management as well as the emigration inclinations of the population in the municipality have been conducted.