

To the scientific jury  
drawn up by Order RD 38-91/20.02.2023.  
of the Rector of SU "St. Kliment Ohridski"

## **REVIEW**

of a dissertation thesis on:

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

of PENKA LYUBOMIROVA PISACHEVA, full-time doctoral student in professional field 4.4. Earth Sciences (Geography of Countries - Regional and Political Geography), Department of "Regional and Political Geography" at the GFF of the University of St. Kliment Ohridski", with scientific supervisor Prof. Dr. Marin Rusev

by Assoc. Dr. Kosyo Stoychev, Head of the "Regional and Political Geography" Department at the University of St. Kliment Ohridski" and Chairman of the Scientific Jury.

#### **I. Reference for the PhD student**

Penka Lyubomirova Pisacheva - candidate for the educational and scientific degree "doctor" was born on August 16, 1976 in Karlovo. From 1995 to 2005, he was a student majoring in "Geography" at the Faculty of Geography of the University of St. Kliment Ohridski", where he received the Master's degree.

From 18.01.2019 to 17.02.2022 is a full-time doctoral student in the department. She was awarded the right of protection of the Rector of the University of St. Kliment Ohridski".

From 2001 to the present, he has been a teacher of Geography and Economics at "Hristo Prodanov" Secondary School, Karlovo. He speaks English. In the submitted resume, there is data on additional courses, trainings and acquired teacher qualification credits.

#### **II. General characteristics of the dissertation work:**

The dissertation is 232 pages long, including 238 Cyrillic titles in the bibliography and 38 in Latin. 35 "normative sources" were also used, where laws and normative acts from the State Gazette were mixed with development program documents - programs, plans, strategies, which is a methodological flaw . 48 Internet sources are also cited, and their citation is inaccurate because it does not state the date of their last use and therefore does not

qualify as an Internet source citation. Literary sources are not numbered, which requires their counting as in the 20th century, which is not a suitable solution for a dissertation defended in 2023. The dissertation contains 22 appendices, and in the main text 95 figures and 44 tables. Thus, the total volume of the text reaches 295 pages.

The structure of the work consists of an introduction, which includes relevance, object, subject, purpose, five tasks, used methods, information provision, four chapters, conclusion, list of literature and appendices.

The introduction states a hypothesis, which is an appropriate research approach, but the states it defines are axioms rather than dissertation hypotheses. It allows a proportional relationship between the socio-economic status of the main municipal center and migrations. This is probably a valid assumption for more than 50% of all Karlovo-ranked urban centers. It would be much more valuable if the hypothesis sought answers to questions such as - what measures would be productive to change this direct proportionality, that is, the Municipality and the center experience the natural cyclical economic contractions, but under what conditions they can find a way to retain the population are, i.e. to preserve their human potential. In other words, the hypothesis to focus on the study and testing of the factors that create the resilience of the territorial system of the municipality, where can it draw resilience in times of transformation that are historically and economically inevitable?

The object and subject of research are precisely defined. The purpose of the study contains a contradiction. In the title, "migrations" are placed in the first place, while the purpose tells us that: "*The purpose of the study is to track the socio-economic problems as an indicator of the development of the municipality of Karlovo and the city of Karlovo, as a result of which migration processes appear in it.* Also, are socio-economic problems the indicator for the development of the municipality. With the goal defined in this way, the doctoral student must set aside a separate section where he can give a definition of socio-economic problems as a development indicator. Such a terminological and definitive section is missing.

5 research tasks have been formulated, and I consider their number and definition to be accurate and correct. The described approaches, methods and information sources really reflect the dissertation.

Chapter one "THEORETICAL - METHODOLOGICAL BASIS OF THE RESEARCH" is well structured, rich in the necessary information. It consists of two large sections, the first of which is devoted to indicators of the degree of socio-economic development, and the second, to migration as an indicator of regional development. The chapter is reliably and scientifically based developed. In the main two sections, it contains

up-to-date information from established scientists, the quotes and sources are well selected, well related to the topic of the dissertation. An in-depth analysis of the natural-ecological, production-economic and socio-demographic indicators is made, as measures of the degree of socio-economic development. Several of the important statistical methods for the study of migrations are correctly presented. Attention has even been paid to the psycho-social aspects of migrations on the different groups and profiles of the migrating population, which is very appropriate and gives the research a higher societal value.

Chapter Two: " *ORIGIN AND DEVELOPMENT OF KARLVO AS AN ADMINISTRATIVE-TERRITORIAL UNIT UNTIL THE LIBERATION* " contains three sections. This is the most local lore part from the dissertation and within 3 sections is a narrative in a popular-cognitive style - a general natural geographical feature, as well as a historical review from antiquity and the early Middle Ages, as well as the period of Ottoman rule. This shows the doctoral student's love for the territory of the municipality, its past and history. The processes of transformation in terms of economy, ethnic composition of the population, urban planning issues - hamlets, houses, squares and others are affected. The review of the number of the population in the last years of the Ottoman rule according to various authors, as well as the information about its ethnic composition, is very valuable. A valuable analysis is made of the economic specialization of the city and nearby settlements, labor migrations from neighboring settlements, the textile industry, rose growing, various crafts, important Karlovian revivalists, etc. The benevolent personal attitude towards the object of research and rich historical heritage is present, but the chapter does not end with conclusions about the pre-liberation conditions for the growth and development of Karlovo and the region. How these conditions may or may not have catalyzed subsequent population growth. Were there conditions for Karlovo to develop faster and more dynamically after the Liberation? If yes, what were those opportunities, if not, what were the limiting factors? How did these processes catalyze the object, subject, and purpose of the dissertation research?

Chapter three: " *FORMATION OF KARLVO AS AN ECONOMIC AND ADMINISTRATIVE-POLITICAL CENTER FROM LIBERATION TO 1989* " is the second local history and very large chapter in the dissertation. I want to point out that setting a general time frame relating to issues of development in the period from the Liberation in 1878. until 1989 is a bold but unfounded and unmotivated decision. After the doctoral student accepted the intra-party coup in the BKP in 1989. for the end date of a certain period affecting the development of the country and Karlovo, why does he not accept the coup on 09.09.0944. for the end of the Kingdom of Bulgaria? To place the Kingdom of Bulgaria and the People's Republic of Bulgaria in one common period is a serious historical inaccuracy. Manifestation

of misunderstanding of the role of the state system for the progress and development of the entire society. Although there are separate sub-points, the dissertation had to contain reasons or at least one sentence that tried to explain this question, to give an answer to the question why the monarchical period and the socialist period were united in one section. The lack of clarity about this decision is also confirmed by the fact that here you can see a photo of H.V. Tsar Boris III, who opened the railway. the station in Karlovo in 1933. and a few pages further on the subsection " *Economic prosperity of Karlovo after 1944*". ". The coup that liquidated the elite of the Bulgarian nation cannot be defined as a state that leads to "flourishing". It's an anachronism.

The main task of the dissertations in the Department of Regional and Political Geography at SU "St. Kliment Ohridski" is the compilation of scientific studies that defend the objective historical truth about the state of the country, regardless of the political bias of the doctoral students or the members of the department. All forms of nostalgia for any historical period are unacceptable, inappropriate, unscientific. Their place is not in scientific developments, but in the media with political content, which, however, do not award scientific degrees and titles to their authors. I believe that the analysis is tendentious, it introduces an element of suggestions that the socialist period is the most progressive period for Karlovo, without drawing the conclusion that these are achievements and introduction of technologies that in other parts of the world at this historical moment were even more developed and progressive. Without this clear demarcation line, that it is not the political regime, but the historical and technological moment that drives Karlovo forward, as well as any other project to ennoble the cities and regions of Bulgaria, it is difficult to speak of a scientific work. Bulgaria in the middle of the 20th century and without the socialist regime would have had factories, asphalted streets, modern schools, electricity, an army, community centers, etc. These are the achievements of civilization and they affect us regardless of the political regime - "Diffusion of Innovations" by T. Hagerstrand (basic geographical construction and theory). The scientist must observe his object without feeling, without passion, but with scientific methods. His vocation is to seek "objective truth" with scientific methods that are imperfect but objective in relation to the individual's subjective perception. This border was not felt by the doctoral student and was crossed, crossed.

The chapter continues with significant descriptions of factories, statistics, various infrastructures or individual development projects. A widely popular descriptive approach was used, which gives detailed descriptions but low scientificity. No attempt is made to critically answer questions such as – does this structure contribute or limit? What does it provide and what does it take away from Karlovo, etc.? Elements of critical analysis, as

expected from a dissertation, are completely absent. The description leads the reader to a narrative in which almost no research method is established, no comments, conclusions and evidence from the PhD student are found. It is filled with countless historical references that do not contribute to the topic of the dissertation, burdening the text with historicism that is not clear how it relates to the main purpose of the study.

The section dedicated to the settlement structure is rich in information, well structured and informative. Unfortunately, there is a lack of concrete conclusions, conclusions and a connection with the main purpose of the dissertation. This could have enhanced the usefulness of the section and served to provide important starting points for the latter part of the study. The section analyzing the population „ 3.3. POPULATION MOVEMENT AND STRUCTURE " is very large, but it is developed incorrectly. First, what movement is it and what is this single structure or structures? In my opinion, sticking to a more classical methodology in the study of the population and its structures would have been more useful. The "flyover" from issues with the number of the population to the ethnic structure, indicators of the natural movement of the population, and some structures follow again - gender, educational, etc., migrations, labor migrations and a return to age structure ... population density, etc. n. Judgments of a social, economic and political nature follow, which should clarify why the state of the population is the way it is, but in my opinion, the PhD student not only does not answer any problem, on the contrary, it creates additional internal contradictions.

Chapter four "MODERN SOCIO-ECONOMIC TRENDS AND PROBLEMS IN THE DEVELOPMENT OF THE MUNICIPALITY OF KARLVO AND ITS ADMINISTRATIVE CENTER" begins with a description of the situation in Bulgaria after the beginning of the economic transition. A number of opinions of authors are indicated, with which the PhD student agrees and does not make any critical analysis or comment. In general, the historical approach dominates and any attempt at geographical analysis is preceded by an attempt to describe the historical moment. For example, a comment has been made in dozens of places that many businesses are closing or shutting down, but it is not explained why? Is it really the opinion "*...Donchev and Karakashev (2000) determine that the transition in Bulgaria is related to negative trends leading to the great economic crisis in the country. These are: "large internal and external debt, development with an advantage of energy-intensive, material-intensive , raw material -intensive , water -intensive , metal-intensive industries ... strong decline in agricultural production, limited foreign markets, due to non-competitive goods"* was it true? In 2023 can we do another reading of this historical period as well as the socio-economic processes? The following is a description of industries,

companies, firms, etc., which may indeed have only an informative character, but no value for scientific development. After their enumeration, which is not clear on what methodology is based, an analysis of the population's problems begins, but already after 1989. A geographic passport of the municipality was created, but the doctoral student did not use the obtained results to formulate conclusions and conclusions. The following is a significant volume of the work compiled from PIRO Karlovo data, tables, figures, data, description of companies and their products, etc. The "description-inventory" approach applied in the third chapter is also applied here, which is inappropriate for a dissertation. The section includes data on agricultural cooperatives, energy, infrastructures, tourist zoning, festivals and ...followed by unemployment... economically active population, industrial zones, voter turnout, etc. This is followed by a section on the municipal settlement network and territorial structure, which is based on data from PIRO and NKPR, and a section on the inventory of planning documents of the municipality of Karlovo. This narrative is completely unnecessary to the thesis, does not rest on a scientific approach and does not contribute to the thesis. It can be offered to the administration of the municipality of Karlovo to serve them for their purposes, but not for a doctoral thesis.

The section "LOCAL SELF-GOVERNMENT AND MIGRATION PROCESSES IN THE MUNICIPALITY OF KARLVO - DEMOGRAPHIC AND CULTURAL-POLITICAL ASPECTS" describes the parties in the municipal council, how a municipality functions in Bulgaria, and similar data that have no place in a dissertation. A report that does not belong to the author of the dissertation is reviewed, devoting a full 2 pages to it. There is a lack of any studies of the methodology, whether this study was conducted correctly at all. In this way, the doctoral student completely trusts a third party, without analyticalness and criticality towards the source data and conclusions. This is followed by an analysis of labor travel, which completely confuses the reader, data on mechanical population growth and other similar data and judgments.

A survey is presented, some of the questions are incorrect, untested and therefore the results are invalid. For example, "3. *In which period of your life do you think you lived the best?*" When the answers are seen, it is understood that the respondents are asked to evaluate the period of their life according to the political periodization - before and after November 10?!?

In the answers to question "6. *What is your current occupation?*" found that the largest group of respondents were retirees and teachers. And in the answer to question "7. *What is the most important event that led to positive changes in the development of the city of Karlovo and the municipality of Karlovo in the last 2-3 decades?*", the doctoral student points out

*"...About 1/3 of the respondents cannot assess or consider that there are no positive events for the development of the municipality of Karlovo".* It is obvious that the choice of respondents predetermines the answers received. After question 10, there is a comment *"... For almost 42% (out of 154 answers), there are no individuals who have a positive influence on the image of the municipality.* In general, the questions are not arranged logically, they do not lead to a specific research goal, and accordingly, their answers do not reveal in any way a real process or phenomenon that is relevant to the title and purpose of the dissertation.

**The conclusion** does not fully reflect the thesis, and this section does not have the qualities of a thesis conclusion. It does not contain conclusions, but postulates, enumeration and indication of some facts. The summaries are not specific enough for Karlovo and a large part of the things written in the conclusion can be applied to other territory as well.

**The abstract** reflects the structure and content of the dissertation.

Of the mentioned **5 contributions** , I can accept as achieved only 2:

- The development of Karlovo as a municipal center has been traced and the directions of the city's growth after the middle of the 19th century have been visualized;
- A geographical passport of the municipality of Karlovo was created as a basis for analysis and assessment of its current state according to leading indicators;

The remaining three contributions **cannot** be concluded to have been achieved on the basis of the analyses, theses and studies in the main text.

In the dissertation, significant deviations from the topic and purpose of the research are found, a significantly high level of weak scientificity has been admitted in a large part of the dissertation (parts of the third and the entire fourth chapter), the reliance on non-scientific sources such as PIRO of the municipality of Karlovo, the repetition of data from program documents, the untested and incorrect survey and others, cast serious doubt on the quality of the work.

## CONCLUSION

Based on the presented materials on the dissertation, at this stage of the procedure, **I DO NOT RECOMMEND** the respected scientific jury to vote for the awarding of the OCS "Doctor" to PENKA LYUBOMIROVA PISACHEVA, full-time doctoral student in professional direction 4.4. Earth Sciences (Geography of Countries - Regional and Political Geography), Department of "Regional and Political Geography" at the GFF of the University of St. Kliment Ohridski".

The public defense is the final stage of the procedure, where the doctoral student must convincingly present his thesis, argue against the criticisms indicated in order to dispel any doubt about the dissertationability of the work, defend his skills in conducting independent scientific research, as well as the contribution nature of the work .

Sofia, May 5, 2023

Reviewer:

Associate Professor Dr. Kosyo Stoychev