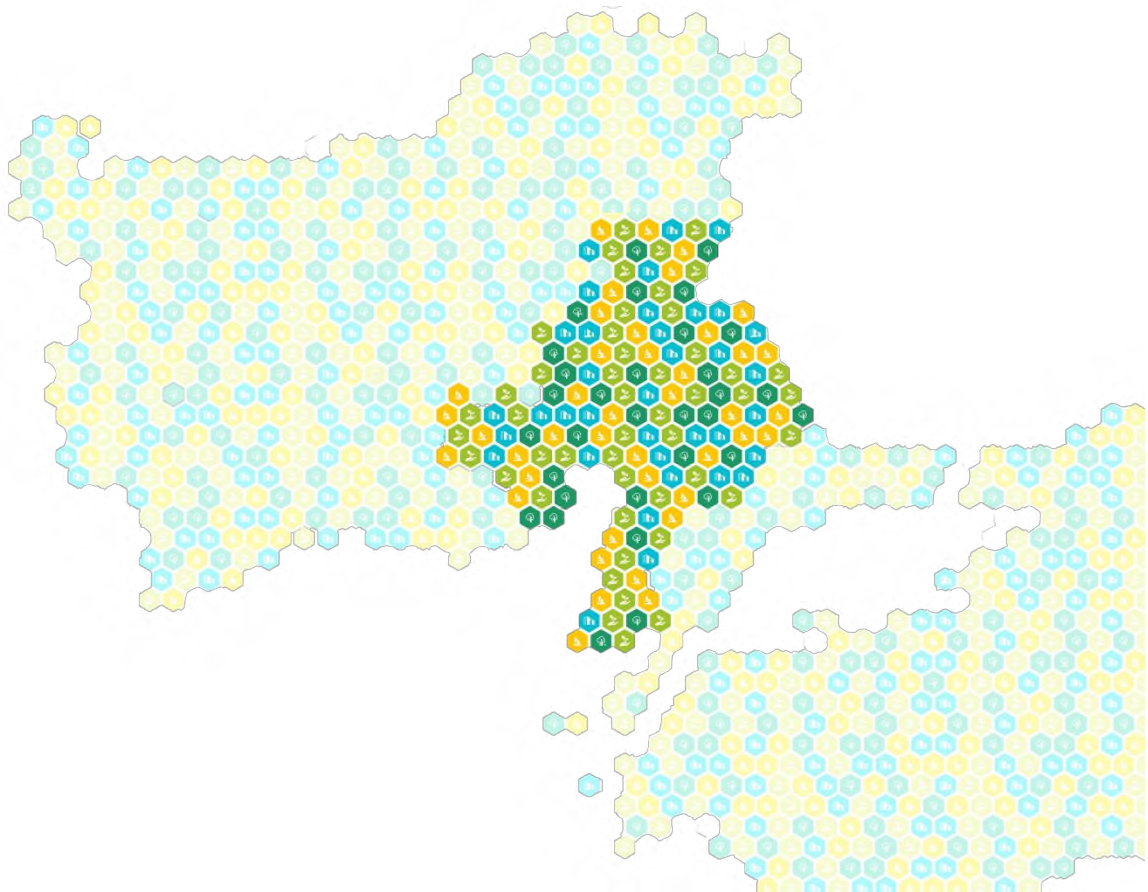




TERRITORIAL STRATEGY FOR INTEGRATED MEASURES

to be financed under the INTERREG - IPA CBC programme 2021 -2027
between the Republic of Bulgaria and the Republic of Turkey

ANALYSIS





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1. INTRODUCTION

This analysis is part of the Strategy for Integrated Territorial Development, for the needs of the bilateral cross-border cooperation programme INTERREG - IPA CB 2021-2027 between the Republic of Bulgaria and the Republic of Turkey. It is a product of Activity 2 as defined in the technical documentation and is subject to review and approval by the Steering Committee.

The main objective of Activity 2 is to prepare an analysis of the needs and development potential of the territories covered by the respective strategy, on the basis of which, in close cooperation with the Steering Committee, the key areas of intervention addressed in the strategy will be identified.

The specific objectives of the Analysis are related to the study of the possibilities for improvement of the territorial interactions, the economic and social cohesion in the programme area, through cross-border oriented interventions.

The *territorial scope* of the Analysis includes the identified geographical area of the strategy, in close cooperation with the Steering Committee. The region is characterized by opportunities for a high degree of interaction and partial interdependence between the different sectors of socio-economic life on both sides of the border.

The *temporal scope* of the analysis mainly covers the period from 2014 to 2018, depending on the available information on certain indicators.

The *thematic scope* of analysis is oriented to the main goal of the task and includes the main areas: economic development, tourism, social development, labour market, culture and cultural heritage, infrastructure, environment and others.

The main sources of reliable information and data for the elaboration of the analysis are provided by the Contracting Authority and closely related to the purpose of the contract Draft Programme's Intervention Logic, Territorial analysis of the Bulgaria-Turkey cross-border area and other materials, obtained under the art.5. Supply of information of the Annex I of the contract.

The information is supplemented by the data from the National Statistical Institute, Eurostat, state institutions and administrations, official sources, cited in the relevant sections. A significant set of international, European and national programmes and strategic general and sectoral documents, assessments and reports have been used and the results and recommendations from them have been analysed.

The main limitation factor in the applied research is the incomplete and fragmented information and the limited access to up-to-date information in some areas, the different formats of data and the related financial, time and intellectual resources necessary for data receiving and processing.

The *methodological framework* for the elaboration of the Territorial strategy is determined by the system of approaches, principles and methods, applied in the process of developing, consulting and implementing strategies for integrated territorial development.

The *integrated approach* unites the participants in the process of strategic planning and programming and in the elaboration and implementation of development policies, stakeholders, representatives of local authorities, business and communities. It combines an analysis of sectoral policies, their spatial dimensions and links. The aim is to identify the potential for positive



synergies between sectoral policies and ways to reduce conflicts between them.

The *cross-border approach* brings together the efforts of partner countries to strengthen the socio-economic development of border areas. This approach increases the ability to solve common problems.

The *ecosystem-based approach* is at the heart of modern planning and programming. The analysis shall take into account the needs of managing human activities in a way, not jeopardizing the ability of ecosystems to cope with change and to ensure the sustainable use of natural products and services by present and future generations.

The *place-based approach* requires to take into account well-structured knowledge of local areas, resources and potential, in order to become the basis for planning for the future, according to the specific characteristics of local areas and population needs.

During the development of the Analysis a system of principles, rules and procedures and modern general and specific methods and tools for processing and analysis of information and documents, for comparative analysis and evaluation have been used. Documentary analysis of programmes and strategic documents, systematization and processing of secondary information from conducted research, content analysis, multifactor, geospatial analyses, comparative analyses and evaluations for stock taking and traditional and specific statistical methods for information gathering have been applied.

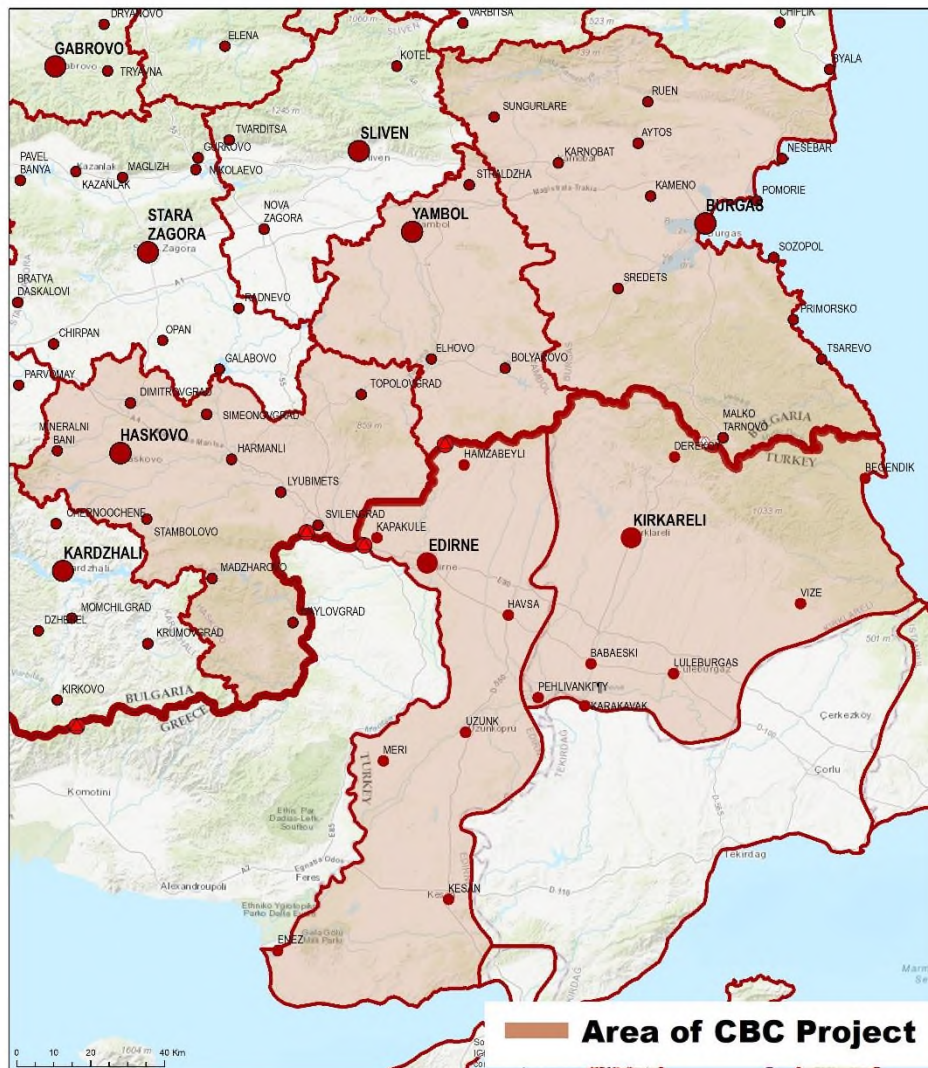
There is still no sufficient statistical information on the impact of the Covid-19 pandemic on the socio-economic development of the region, and the period under review is related to the very high dynamics of the studied parameters. On the other hand, the developed strategy will enter into force at the earliest in early 2022. Until then, national governments plan to control the pandemic, thanks to the intensive vaccination process of the population, and to intensively implement their plans to restore socio-economic life. All this leads to the conclusion that the analysis must pay attention not so much to the negative effects of the pandemic as to the new possibilities it offers and to the needs and potentials for development on the basis of which cross-border cooperation can contribute to the recovery from the crisis.

2. CROSS-BORDER AREA DESCRIPTION

2.1. Programme area and regional structure

The area for cross-border cooperation between the Republic of Bulgaria and the Republic of Turkey defined in close cooperation with the Steering Committee (Map 1) covers 5 territorial units at NUTS level 3 or equivalent: Burgas, Yambol and Haskovo districts on the Bulgarian side and 2 Turkish provinces - Edirne and Kirkarelı. The total area of the zone amounts to 29,000 km². The programme zone in Bulgaria represents 14.99% of the country's territory, and that in Turkey, respectively, 1.58% of the entire territory of the country.

Map 1: Map of cross-border region



The border between Bulgaria and Turkey is nearly 288 km long and passes through three border checkpoints Kapitan Andreevo – Kapıkule, Lesovo– Hamzabeyli and Malko Tarnovo– Dereköy. The border is external to the European Union.

2.2. Geographic characteristics

The geographic structure of the cooperation area (Map 2) includes plains, valleys and hilly areas with an altitude of 710 m to 1000 m. To the northwest, the region borders the Eastern Rhodopes and the low branches of Sakar Mountain in Bulgaria. To the southwest, the region borders the Aegean Sea (Saros Bay) in Turkey. To the northeast, the cooperation zone borders the Balkan Mountains in Bulgaria, to the east - the Black Sea coast in Bulgaria and Turkey and to the southeast the Strandzha/Yıldız Mountains.

Map 2: Geographic map of cross-border region



The highest peak of Strandzha is Mahya Dağı (1031 m) in Turkey, while the highest point on Bulgarian territory is Golyamo Gradishte (710 m). The total area of the mountain is approximately 10,000 km². The climate in the region is significantly influenced by the Black Sea and is mainly humid continental in the mountains and humid subtropical along the coast.

The area has water reserves composed of surface and groundwater. The Maritsa River and the Tundzha River are the largest in the region and flow through Bulgaria to Turkey. Strandzha has



the richest water resources in the entire cross-border region and it provides the source of five rivers, the largest of which are the Ropotamo River, the Dyavolska River and the Veleka River. The surface waters are supplemented by several large lakes, located on both the Bulgarian and Turkish sides. Groundwater resources consist of mineral springs and thermal waters.

The climate varies from continental to continental Mediterranean, characterised by mild winters and hot summers. The mountains are usually afforested with coniferous and deciduous tree species, with the latter predominating.

The environment in the area is assessed as having a high degree of sensitivity to climate change. Droughts, floods and forest fires are potentially significant risks in the area.

3. DEMOGRAPHY

The total population of the cross-border cooperation (CBC) area is 1,529,757 inhabitants (Table 1)¹. It is divided approximately equally on both sides of the border.

The population of the Bulgarian part of the CBC zone is 757 369 people and represents 10.82% of the total population of the country. Nearly half of the population is concentrated in the three largest cities - Burgas (208 915 inhabitants), Yambol (68 074 inhabitants) and Haskovo (86 611 inhabitants).

The population in Burgas district shows a slight upward trend, while in Haskovo and Yambol districts there is a significant decline – 7.5% and 11%, respectively.

During the period between 2011 and 2018, the population in the CBC region increased in only a few cities - Burgas, Nessebar, Sveti Vlas, Obzor, Aheloy and Harmanli.

The Updated National Concept for Spatial Development of Bulgaria² (UNCSD, 2019) states that the cities considered through their administrative, economic, transport, educational, cultural, tourist, social and communication functions, play a key role in the development of the territory.

Defined as significant urban development centres of regional importance in the concept, Yambol and Haskovo are losing nearly 10% of their population. Cities of micro-regional (supra-municipal) importance, from level 4 according to the UNCSD, are also losing population. This process is particularly intensified in Topolovgrad, Elhovo and Malko Tarnovo, which calls into question their ability to perform their functions as important centres for the groups of municipalities. The overall picture shows the inability of lower-level regional centres to keep the population in the midst of free movement in Bulgaria and the EU and to withstand competition of large cities.

The population on the Turkish side is 772 388 people, which represents 0.94% of the total population in the Republic of Turkey. The population of Edirne Province according to the population registration system based on addresses for 2018 is 411 528, which ranks it 48th largest place in Turkey. According to the same source, the population of Kırklareli province for 2018 is 360 860 and assigns it 54th place. There are a total of 9 districts in the province of Edirne, the largest in terms of population being Keşan and Uzunköprü. There are a total of 8 districts in

¹The data tables are included in the Annex to the Analysis

²<https://www.mrrb.bg/bg/aktualizaciya-na-nacionalnata-koncepciya-za-prostranstveno-razvitie-za-perioda-2013-2025-g/>

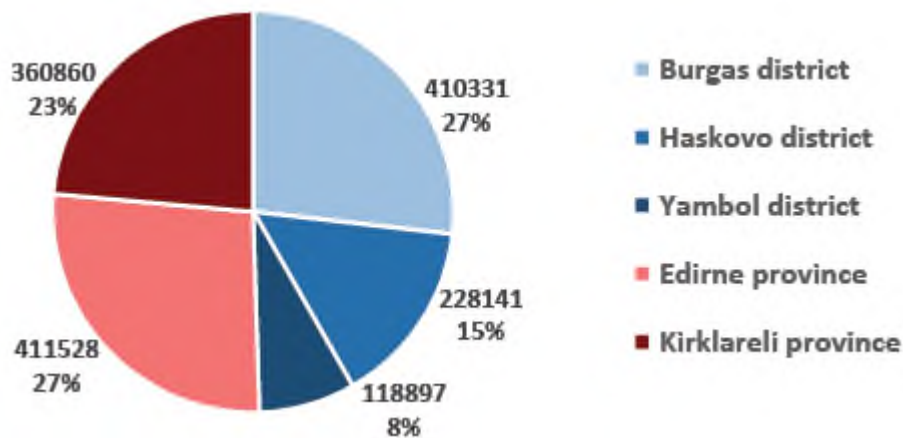


Kırklareli province, and the largest are Lüleburgaz and Babaeski.

3.1. Population by districts/vilayets

The distribution of the population by districts (Figure 1) and cities (Table 1) on both sides of the border shows serious differences. While on the Turkish side it is almost evenly distributed in the two provinces (23% and 27% of the population of the CBC territory), on the Bulgarian side Yambol district (8%) has twice less population than Haskovo district (15%), which in turn is in a similar correlation with Burgas district (27%).

Figure 1: Population by Districts/provinces



Source: Territorial analysis of the Bulgaria – Turkey cross border area

Another big difference is in the distribution of the population by cities. On the Bulgarian side, the city of Burgas has a population of about 200 000 people, and Haskovo and Yambol - about 70 000 people. They are followed by Dimitrovgrad - about 35 000 and the cities of Aytos, Harmanli, Karnobat and Svilengrad about 20 000 people each.

On the Turkish side, Edirne has a population of about 200 000, but Lüleburgaz and Kırklareli are about 150 000 and 100 000 respectively, Keşan – 85 000, Uzunköprü – 60 000, Babaeski– 50 000, İpsala and Vize - about 30 000 each. In the Bulgarian part of the CBC zone there are four cities with a population of over 30 000 people, and in the Turkish part – eight.

This, together with their location in the territory, shows that in the Turkish part of the studied territory there is a relatively balanced location of cities with regional and micro-regional importance.

In the territory on the Bulgarian side of the border there is no such balance and this makes the centres such as Svilengrad, Topolovgrad, Sredets, Malko Tarnovo and Tsarevo key to the sustainable development of a significant part of the CBC area.

On the Bulgarian side, compared to the national values, the rate of natural growth³ is higher for the district of Burgas and lower for the districts of Haskovo and Yambol (-6.5‰). In addition, due to the negative natural growth (mainly in rural areas, with a value in the CBC region around -14‰) and the dominant migration processes. There are serious differences between the three

³Territorial analysis of the Bulgaria – Turkey cross-border area



districts, especially with regard to rural depopulation.

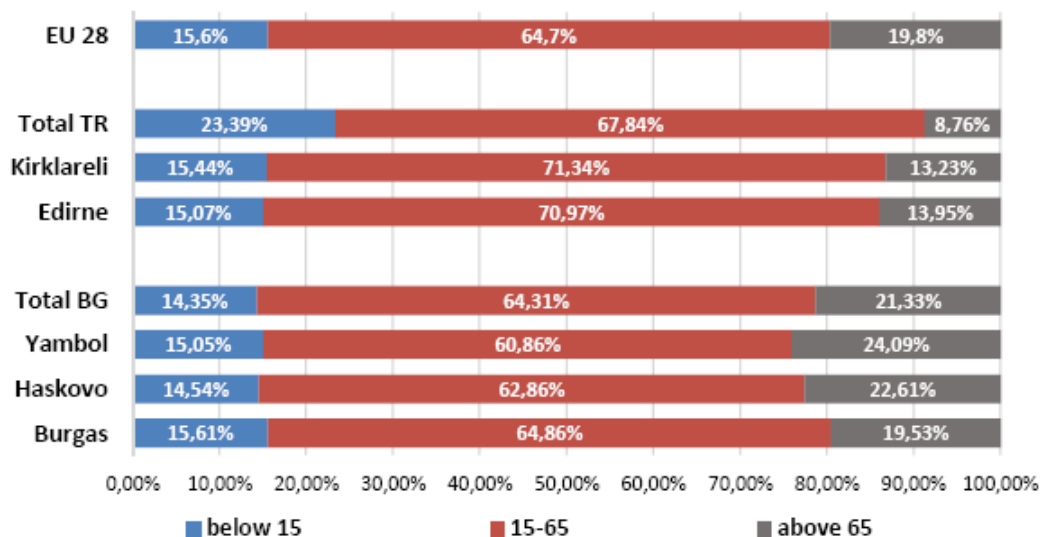
On the other hand, the Turkish part of the cooperation area shows demographic stability and a positive rate of natural growth⁴- its value in 2018 is slightly below the Turkish average (14.7‰). With regard to migration flows in the CBC region, it can be noted that inward migration is higher than outward migration, e.g. net migration is positive (as it is neutral for the country).

3.2. Population by age

The population on the Bulgarian side in the cooperation area (Figure 2) has been aging in recent years, following the national trend, as the aging index for 2019 is higher than the national average. As a result of low birth rates and migration to large cities and abroad, the working age population, especially in rural areas, is declining and currently accounts for less than two-thirds of the total. This determines the higher demand for social and health services on the one hand and a relatively lower volume of consumed goods and services, in line with the lower incomes of the group over 65 on the other.

The Turkish side of the cooperation area (Figure 2) has also been facing an aging population in recent years.

Figure 2: Population by age groups



Source: Territorial analysis of the Bulgaria – Turkey cross border area

In the age group of 0-14 years, the values are correspondingly close to those on the Bulgarian side, but are significantly lower than the average for Turkey. The percentage of those over 65 is higher than the national average, but significantly lower than in the Bulgarian part of the zone. However, the share of the working age population is above the average for Turkey and significantly higher than in Bulgaria in the area. All this outlines a more favourable demographic potential for development for the CBC area in the Republic of Turkey.

3.3. Population density

The average population density (Table 2) of the CBC zone in the Republic of Bulgaria is lower

⁴Territorial analysis of the Bulgaria – Turkey cross-border area



than the national one (63.9 inhabitants per km²) and varies significantly at the municipal level.

The population density (Table 2) for the CBC area in the Republic of Turkey shows an increasing trend, but remains lower than the national one (107 inhabitants per km²). Edirne and Kırklareli fall below the average population density of the Republic of Turkey.

The Strandzha region on both sides of the border is emerging as the least populated area in both countries.

The average population density in the entire Bulgarian-Turkish region for CBC in 2019 is 51.26 inhabitants per km², which is far below the average for the EU-28, which is 117.7 inhabitants per square km.

4. MIGRATION FLOWS

In the field of migration, the situation in recent years has clearly shown that the overall management of migration processes requires consensus solutions at EU level and enhanced cross-border cooperation. Illegal migration remains a major concern in Europe and at Europe's external borders, and the complex nature of the mixed flows of economic and other migrants, refugees and asylum seekers will continue to pose additional challenges.

Bulgaria and Turkey are among several countries on the Balkan Peninsula that were the centre of the influx of refugees in 2014-2016. Turkey currently hosts nearly 4 million refugees and migrants.

In contrast to the declining number of asylum applications in both countries, World Bank data⁵ show an increasing number of registered refugees in Bulgaria and Turkey, i.e. those who have been granted asylum or other form of protection.

Despite the observed decline in migration flows in the Bulgarian-Turkish CBC since the end of 2016, the border area still functions as an intersection of the so-called Eastern Border Road (Frontex)⁶, preferred by migrants and asylum seekers coming from the Middle East and South Asia. The annual report of the European Migration Network (EMN)⁷ on migration and asylum in Bulgaria for 2018 states that the Bulgarian border authorities detained 1 323 people in an attempt to cross the border illegally, 689 of them at the entrance and 634 at the exit. Eighty-seven (87) pre-trial proceedings have been instituted and 112 people have been charged with trafficking immigrants, trying to smuggle 707 people across the border. These challenges have made anti-smuggling policy an essential part of the EU's response to the migrant crisis. That is why it is crucial for the Bulgarian and Turkish border authorities to strengthen their operational cooperation and exchange of the information.

As indicated by the European Council on Refugees and Exiles in the reports for Bulgaria and Turkey for 2020⁸, there is a growing trend in the number of unregulated illegal migrants and the number of unaccompanied minors in both countries.

⁵<https://data.worldbank.org/indicator/SM.POP.REFG?end=2019&start=2019&view=bar>

⁶<https://frontex.europa.eu/along-eu-borders/migratory-routes/eastern-borders-route/>

⁷https://ec.europa.eu/home-affairs/sites/home-affairs/files/03_bulgaria_country_factsheet_2019_en.pdf

⁸<https://www.asylumineurope.org/reports>



Unaccompanied asylum seekers in Bulgaria and Turkey have been treated in accordance with a special regulatory framework adopted in the spirit and framework of related EU legal and procedural practices, but there is still room in both countries for further improvements in applied methods and practices for work with vulnerable migrants⁹.

The protocol signed between the two countries in 2016 for the implementation of the declaration between the EU and the Republic of Turkey, established a formal governmental basis for operational cooperation in the fight against illegal migration, which is why specific cooperation actions are on the agenda. There is continuing social and political instability in the Middle East and South Asia. At the same time, Frontex points out in its 2020 risk assessment report¹⁰ that any perceived or actual deficits in migration management in transit regions (such as Turkey and Bulgaria) could lead to much greater pressure on the EU. All of this defines the ongoing need to improve institutional and technical capacity to adequately respond to security and humanitarian challenges.

5. ECONOMIC DEVELOPMENT

5.1. Main economic indicators

The analysis of economic development is made on the basis of comparisons of the following indicators: GDP by territorial units for statistical purposes; GDP per capita; and Gross value added (GVA).

The Bulgarian economy has been growing steadily for the last 7 years (until 2019 inclusive). Real gross domestic product (GDP adjusted for inflation) grew by about 3.2% in 2018 and 3.4% in 2019. The strengthening of GDP growth in recent years is mainly due to improvements in overall productivity and growing individual consumption. The growing economic activity of the population, higher employment and rising wage levels also have a positive effect. Another factor with a positive impact is the dynamically developing global economy, which has led to growing demand for Bulgarian goods and services, competitive on world markets.

At the same time, regional disparities are growing and hindering the balanced territorial development of the country. Large imbalances in GDP are also observed when comparing the constituent districts of the NUTS 2 regions. (Table 3) In most cases, the values in one or two districts of a region are several times higher than in the others.

The Republic of Turkey is the 18th largest economy in the world and the largest among the candidate countries for EU membership. For the period 2007-2017, Turkey's real GDP has doubled (Table 4). Unlike the stability of the Bulgarian lev, the devaluation of the Turkish lira and the uncertainty, stemming from global trade tensions, continue there. As a result, the economy reported a growth rate of 0.9% in 2019. Inflation, which was reported as 20.3% in 2018, slowed to 11.8% in 2019.

Economic activity in both countries continues at a strong pace until mid-March 2020. The impact of the Covid-19 pandemic on the economies is gradually increasing and becoming a major factor.

⁹ECRE's reports on Bulgaria and Turkey for 2020 <https://www.asylumineurope.org/reports>

¹⁰<https://frontex.europa.eu/publications/frontex-releases-risk-analysis-for-2020-vp0TZ7>



Bulgaria and Turkey have introduced comprehensive measures to limit the adverse effects of the pandemic. The duration of the emergency is key to the opportunities and timing of economic recovery.

According to the information on GDP by regions on the Bulgarian side (Table 3), Burgas district dominates significantly by almost 2.5 and 4.5 times over Haskovo and Yambol. On the other side of the border, the provinces of Edirne and Kırklareli show similar results. The Bulgarian zone produces only 7.56% of the country's GDP at 10.82% of the population, while the Turkish provinces produce 0.85% of GDP at 0.94% of the population. In both cases, this shows that these territories are not the most developed in their countries, especially in Bulgaria. It should be noted that the significant part of the imbalance on the Bulgarian side is a result of the lower performance of the districts of Haskovo and Yambol, which produce only 28% of GDP compared to nearly 46% of the population. This is also noticeable in the analysed GDP per capita.

The province of Kırklareli shows faster growth than Edirne in the Turkish region. This is mainly due to the larger share of industrial production (mainly in the textile sector), while in Edirne the share of agricultural production is higher (national averages).

The values of the indicator for GVA in Bulgaria at national level show characteristics with that for GDP. In terms of the distribution of GVA between sectors (Table 5), in all years the leading tertiary sector (services) is followed by the secondary sector (industry) and the primary sector (agriculture, forestry, fisheries). Between 2013 and 2017, the secondary sector registered a slight relative increase from 27.27% to 28.44%, while the primary sector registered a decrease from 5.36% to 4.69%, and the tertiary sector also decreased from 67.37 % to 66.87%. With the positive developments available in all three sectors, this shows that the industry is growing faster.

Like the GDP indicator, the findings about the GVA at district level are identical. The sectoral dynamics of GVA determines the priority development of the various economic activities in the given NUTS 3 region (district). On the Bulgarian side, the highest values of the GVA indicator (Table 5) are registered in Burgas district, and the lowest in Yambol district. There is a steady trend of dominance in the service sector and in 2017 its share was 56% against 37% for the industry sector and 7% for agriculture. Compared to the results at the national level, the primary and secondary sectors in the Bulgarian territory of the CBC area have a significantly higher contribution at the expense of the tertiary.

As can be seen from the data (Table 5) for the share of GVA in the various economic sectors of the Bulgarian districts in the cross-border area in the period 2014-2017, the service sector has been and still has a leading position. Only in Burgas district there is a slight decrease in the share of the service sector (from 73.39% to 63.95%) and agriculture (5.66% to 4.73%), while the industrial sector has increased its share for the period from 20.96% to 31.31%. In Haskovo district the share of industry increased from 23.28% to 26.77% at the expense of the shares of the service and agriculture sectors, which marked a slight decline. In contrast to these two districts, in the district of Yambol the share of services is growing at the expense of that of industry, while the share of agriculture is maintained.

The values of the GVA indicator in the Republic of Turkey (Table 5) at the national level (from 2004 to 2017) show an increase in the share of the secondary sector from 28.8% to 32.9%, a significant decrease in the share of the primary sector from 10,8% to 6.9% and maintaining the share of the tertiary sector from 60.5% to 60.2%. Taking into account the serious growth of the



Turkish economy for the period under review, it can be concluded that the industrial production in the country is experiencing a real boom.

This can be seen in the Turkish part of the CBC area, especially in the province of Edirne, where the growth of the share of industrial production in the period increased from 18.1% to 23.4%. The share of the service sector there also increased significantly from 48.5% to 57.9%. All this is at the expense of the primary sector, which is significantly reduced from 33.4% to 18.7%. Kırklareli province shows similar trends, but with more intensive growth of the services sector from 37.3% to 42.3% and weaker growth in the share of industry from 41.9% to 45.8%.

5.2. Foreign direct investment (FDI)

The direction of investment and sustainability depend on the trends of global trade and investment flows, as well as on the investment climate of the countries in which investments are made. In the first years of Bulgaria's membership in the EU, relatively large volumes of foreign direct investments were made, one third of which were in industry.

In recent years, the volume of FDI for Bulgaria, calculated as a percentage of GDP, is below the EU average with significant regional differences. Sofia attracts more than half of non-financial foreign direct investment. Other major recipients are larger urban centres, especially in the southern part of the country, which increases the economic performance of these regions.

Burgas District attracts a significantly larger share of foreign direct investment compared to Yambol and Haskovo (Table 6). This is due to the high level of industrialization in the area, as some industries are the only or decisive for the country: dark and light petroleum products, chemical fibers, plastics and other chemical products; shipbuilding, ventilation equipment, construction of freight cars, fish processing industry, etc. The industry is characterized by the possibility of great diversification and plays the role of a leading sector in the economic structure.

As for the Republic of Turkey, its impressive development and structural reforms implemented over the last decade make it the seventh most popular FDI destination in Europe in 2018¹¹. The record holders in terms of investment are the financial and manufacturing sectors (Table 7).

5.3. Tourism sector

Tourism is an important economic activity for Bulgaria and forms about 12% of GDP and 11% of employment in the country. An important competitive advantage in the creation of tourist products is the spatial distribution of tourist resources of the country, characterized by a high degree of overlap and territorial proximity of natural and cultural sites. The ability to combine different leisure activities in time and space reveals the potential for overcoming seasonality and increasing the usability of the tourist superstructure.

The upward development of the national tourism preceding the Covid-19 crisis is a gratifying fact, but at the same time there are serious negative factors - threats to the sustainable development of both established and new destinations. These are the aging of the population, high unemployment on the periphery, poverty, crime, climate change, increased pressure on natural resources, political instability in the region. This context is institutionalized in the leading strategic document of the sector - the National Strategy for Sustainable Tourism Development in the

¹¹<https://www.invest.gov.tr/en/whyturkey/pages/fdi-in-turkey.aspx>



Republic of Bulgaria, 2014-2030 (updated version 2017)¹².

The regionalisation of the tourist offers in Bulgaria began with the conceptual differentiation of nine tourist regions. The CBC programme scope includes two of them - Burgas Region (with specialization in sea and cultural tourism) and part of Thracian region (with specialization in cultural and wine tourism). The extended specialization of the Burgas region includes: 1) sea recreational tourism, 2) cultural tourism (all types), 3) adventure and ecotourism, 4) health tourism (all types), 5) rural tourism, 6) religious and pilgrimage tourism. With the exception of sea tourism, the Thracian region has a similar palette of specialized offer: 1) cultural tourism (all types), 2) wine tourism, 3) business tourism (MICE), 4) urban leisure and shopping tourism, 5) health tourism (all types), 6) adventure and ecotourism.

The delineation of the tourist regions aims at the formation of regional tourist products and the implementation of regional marketing and advertising. It can be expected that with an active and consistent policy, tourism zoning will begin to play the role of a spatial basis for the effective organization of tourism resources in competitive regional tourism products.

Outside the scope of maritime recreational tourism, the main efforts/actions in the aspect of "tourism supply" should focus on:

- Development of attractive sites of natural and cultural heritage - restoration, protection, exhibition, equipment, animation;
- Improving the access and the adjacent tourist infrastructure;
- Formation and marketing of regional tourist products;
- Promotion of natural and cultural heritage;
- Research of areas for cooperative tourist offer "Bulgaria - Turkey".

According to the official data for 2017, the spatial structure of resources and their use in the sector are concentrated on the Black Sea coast - 68% of beds, 69% of overnight stays and 67% of revenues. More than 25% of the figures above as accommodation, almost 40% of beds and more than 35% of the revenues in the tourism sector come from the CBC region (Table 8) with the main share of Burgas district (of almost 90%), while the other two districts do not make a significant contribution.

Data on the number of nights in 2018 show 26 845 013 overnight stays realized for the whole country, of which 35.6% for Burgas district, 0.26% for Yambol district and 0.43% for Haskovo district. Burgas District is the sole leader in the number of nights spent by foreigners - 44% of the number for the whole country.

In addition to diverse tourist resources, the CBC region has a relatively good tourist infrastructure, actively generating markets with growing demand and significant untapped potential for successful development as a tourist destination.

The resources of the mineral water allow a combination of climate and balneotherapy (Pomorie, Burgas, etc.). The Strandzha region with its natural landmarks, megalithic complexes and unique

¹²<https://www.tourism.government.bg/bg/kategorii/strategicheski-dokumenti/nacionalna-strategiya-za-ustoychivo-razvitie-na-turizma-v>



cultural heritage has the potential to valorise its full potential.

The region also has to deal with the challenges of the modern environment and competition, marketing, existing management deficits, shortcomings in the legal framework and a shortage of qualified staff. Coordinated actions of private and public institutions are needed for the construction and maintenance of tourist, technical and information infrastructure.

The realization of the potential of the Bulgarian tourist regions depends on the compliance of the applied tourism policy with the policy priorities in a wider European context, among which: increasing the competitiveness of the sector; promoting the development of sustainable, responsible and high-quality tourism; consolidating the European tourist image and profile; streamlining the potential of EU policies and financial instruments for tourism development.

The Republic of Turkey is a very popular tourist destination around the world. Despite their cultural, historical and natural opportunities, Edirne and Kırklareli are not the most popular areas for tourists. In terms of summer tourism, the shores of the Mediterranean and the Aegean, which provide a better developed tourist infrastructure, are more preferred by tourists than the Black Sea coast.

Throughout the region of Thrace there are attractive resources for the development of most of the 17 forms of tourism in Turkey - ecotourism, agricultural, wine, religious, archaeological, speleological, ornithological tourism, water sports, hang gliding. In order to increase revenues and to develop environmentally responsible tourism, the Regional plan of the region of Thrace¹³ offers a number of measures and policies for conservation and promotion of sites, for the development of human resources capacity and for regional cooperation.

The Tourism Master Plan of the Thrace region¹⁴ examines in more detail the possibilities and outlines a direction for development, based on Edirne, as a key element of the Thrace tourist corridor, with its values on the UNESCO World Heritage List. The possibility for expansion of the tourist routes is pointed out through appropriate exposition of cultural values from different historical periods, inclusion of sites of attraction among other religions, such as churches and synagogues, castles and monasteries, inclusion of Kırkpınar and Hidrellez festivals and unique culinary specialties.

On the Turkish territory of the CBC region, as of 2018, there are a total of 129 accommodation places in Edirne, 32 of which with a tourist certificate and the remaining 97 - with municipal. Their total capacity is 1 063 beds. In Kırklareli there are 14 places for accommodation with a tourist certificate and 23 with municipal. The difference shows the importance of Edirne as a tourist centre of the region.

In 2018, the number of nights in places with a certificate for tourist sites in the country is 144 415 267, of which 0.2% are in the province of Edirne and 0.05% in Kırklareli. The average length of stay in the facilities for Edirne and Kırklareli is below the national average. The employment rate in the facilities with a certificate for a tourist establishment is 56.43% in Turkey, 38.66% in Edirne and 30.57% in Kırklareli.

¹³<https://www.trakyaka.org.tr/en/35343/Thrace-Region-Region-Plans>

¹⁴https://www.trakyaka.org.tr/upload/Node/33089/xfiles/Trakya_Bolgesi_Turizm_Master_Plani.pdf



5.4. Small and Medium-Sized Enterprises

The criteria for small and medium-sized enterprises (SMEs) in Bulgaria include an average number of employees, less than 250 people, certain values of annual turnover and status of the enterprise (independent, partner, associated).

Small and medium enterprises generate over 60% of Bulgaria's national GDP. The largest is the share of the group of micro-enterprises (between 0 and 9 employees), which in 2018 reached 92.7% of the total number of enterprises in the non-financial sector (compared to 91.23% in 2009). The second largest is the group of small enterprises (with staff between 10 and 49 employees).

The total number of enterprises in the region for 2018 is 48 047, reaching a share of almost 12% of the total number of enterprises in Bulgaria. SMEs in the Bulgarian section of the CBC area (Table 9) are unevenly distributed by districts, as in Burgas district 64% of them operate there, in a district with nearly 55% of the population. Nearly 25% of SMEs in the region are located in Haskovo district with 30% of its population, and in Yambol district only 11.33% with almost 16% of the population. This shows that the overall conditions for doing business in Burgas district are better than in Haskovo district and significantly better than Yambol district. There is a need to concentrate policies to improve the business environment in these two districts.

The construction of industrial zones is the basis of measures of the Bulgarian government to promote economic activity¹⁵. There is only one functioning Industrial and Logistics Park in the Bulgarian CBC region - Burgas, under the joint management of the National Company Industrial Zones and the Municipality of Burgas.

The definition of a SME in Turkey includes enterprises with less than 250 employees and annual net sales revenues or an annual financial balance of less than 125 million Turkish lira. There are currently 3 645 469 SMEs operating in Turkey, representing 99.83% of all registered enterprises in the country. SMEs contribute 62% to total GDP, 55.1% to exports and include 72.7% of the labour force. The micro-enterprises (between 0 and 9 employees) have the largest share of SMEs (93.65%), followed by the second group (between 10 and 49 employees) with 5.29% and the third group with 0.89%.

At the end of 2017, there were 11 854 enterprises (6 203 in Edirne) and (5 651 in Kırklareli) on the Turkish territory of the CBC region¹⁶.

The distribution of the sectors in Edirne and Kırklareli, according to the NACE REV.2 classification, provides important guidelines for the dominant sectors in economic activity and those that create employment (Table 10). The highest employment sectors in Edirne are retail, building construction, food and beverage production and construction and landscaping. In Kırklareli the dominant sectors are construction, retail trade and food production. In both provinces the largest number of enterprises engaged are in the retail trade.

It can be concluded that SMEs are of key importance for the economic development of the entire CBC area, which is why a comparative meta-analysis has been prepared to determine the general needs and potentials for SME development in the CBC area. The draft Strategy for Small

¹⁵<https://www.trakyaka.org.tr/upload/Domain/trakyaka/09072013yl8AAu.pdf>

¹⁶Territorial analysis of the Bulgaria – Turkey cross-border area



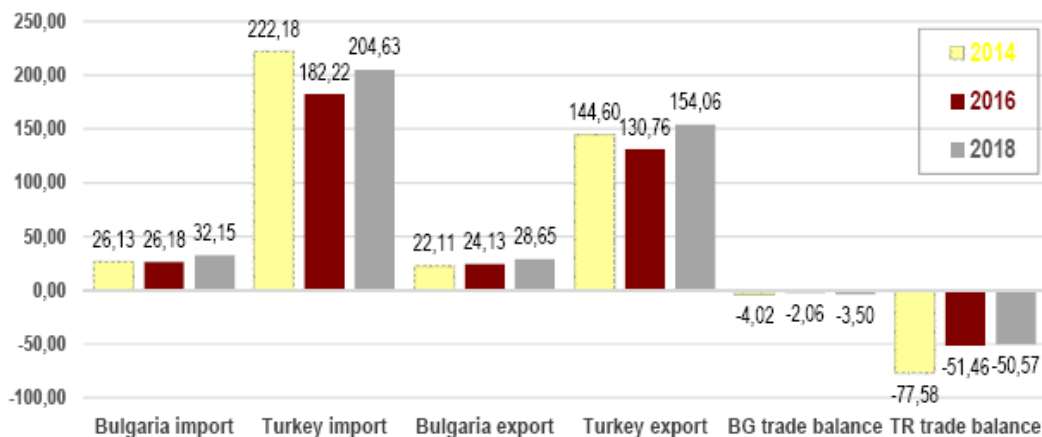
and Medium Enterprises for the period 2021-2027¹⁷ was used as an information base on the Bulgarian side and the Report of the Special Expert Commission on SMEs for the Thrace Region¹⁸ from Turkey.

The summarized results include the need for overall improvement of the business environment, raising the qualification of the staff, introduction of new technologies, development of innovations, provision of information and financial resources. The identified potentials for development include connecting vocational training and business needs in the long run, adapting traditional industries to modern requirements and development policies, joint participation in projects, development of the manufacturing industry and others.

5.5. Trade

There is an overall positive link between international trade and economic growth. According to the latest data for 2018 (Figure 3), imports to Bulgaria are worth 32 billion Euros, and exports of about 29 billion. The Republic of Turkey imports 205 billion Euros and exports over 150 billion.

Figure 3: Trade in Bulgaria and Turkey (billion EUR)



Source: Territorial analysis of the Bulgaria – Turkey cross border area

Both imports and exports for Bulgaria increased over the period 2012 and 2018. Turkey also shows a positive trend in imports and exports in the last three years, after the decline until 2016. Stronger domestic demand increases the volume of imports in Bulgaria, while development exports are slowing due to lower economic growth and demand in the EU's main trading partner.

Both countries have a negative trade balance, with Bulgaria's trade deficit widening over the past three years. Given the growth driven by consumption, such a situation weakens real economic growth. There is a need for policies to support the inflow of foreign direct investment (FDI) and the growth of exports of services.

The main export destinations of Bulgaria are Germany, Turkey, Italy, Romania and Greece, and the largest volume of imports comes from Germany, Russia, Romania, Turkey and Italy.

In recent years, trade between Bulgaria and Turkey (Table 11), as a key indicator of bilateral

¹⁷<https://www.mi.government.bg/bg/themes/nacionalna-strategiya-za-malki-i-sredni-predpriyatiya-msp-v-balgariya-2021-2027-g-2194-285.html>

¹⁸<https://www.mrrb.bg/bg/stroim-industrialni-zoni-s-evrosredstva-ot-novata-programa-za-razvitie-na-regionite/>



economic relations, has shown a steady growing trend.

For Turkey, the foreign trade surplus is of great importance to the country. In this regard, while Edirne has a foreign trade deficit, Kırklareli has a foreign trade surplus based on the high export potential of the produced products (Table 12).

The province of Edirne mainly exports agricultural products, fish products, food and beverages, ready-made clothing, chemical materials and products, other non-metallic mineral products, metal products, machinery and equipment, medical instruments, precision optical instruments and watches, furniture and more.

Kırklareli Province relies mainly on the export of agricultural products, food and beverages, textiles, ready-made clothing, basic metal industry, machinery and equipment and others.

Edirne exports to 85 countries and imports from 42 countries. By 2018, the share of the top 10 countries in Edirne's exports (Table 13) is 67.4%. Bulgaria has the largest share with 17%, followed by Albania and Kosovo with 7.3% and 6.7% respectively.

The share of the top 10 countries in Edirne's imports (Table 13) is 92.2%, with Bulgaria having the largest share with 44.2%, followed by the Russian Federation and Romania with 18.7% and 8.7% respectively.

Kırklareli exports to 135 countries and imports from 68 countries. As of 2018, the share of the top 10 countries in Kırklareli's exports (Table 14) is 45.5%. Bulgaria is on the 4th place with 4.9%. 5.9% of the exports of Kırklareli province go to Bulgaria and Greece.

The share of the first 10 countries in the import of Kırklareli (Table 14), which includes Bulgaria, is 81%. The Russian Federation has the largest share in imports with 49.6%, followed by Kazakhstan and China with 6.3% and 5.5% respectively.

Identifying Bulgaria as a major foreign trade partner of Edirne Province and one of the important partners of Kırklareli Province is important for good relations between the two countries.

5.6. Global competitiveness of national economics

The Global Competitiveness Report¹⁹, published annually by the World Economic Forum, ranks the national economies. In the 2018-2019 edition, Bulgaria ranks 49th out of 141 countries analysed, advancing from 51st place in the previous edition. For the same period, Turkey retains 61st place worldwide, with a slight improvement (+0.5 points) over the previous year. Compared to the period 2012-2013, Bulgaria is improving its performance (advancing by 13 positions), while the data for Turkey show a decrease (by 18 positions) in the global ranking.

Both economies face challenges such as healthcare, skills, product market, financial system, and the maturity of the innovation ecosystem. The ICT sector remains one of the variables on which both countries are relatively well positioned.

The report finds that global economies have failed to achieve the necessary balance between technological integration and human capital to ensure competitiveness, equity and sustainability.

¹⁹http://www3.weforum.org/docs/GCR2017-2018/03CountryProfiles/Standalone2-pagerprofiles/WEF_GCI_2017_2018_Profile_Bulgaria.pdf



Increasing competitiveness remains the biggest contributor to improving living standards.

The Global Competitiveness Index 4.0 is based on four main components and twelve pillars, which determine the factors on which the level of productivity depends: i) Favourable environment; ii) Human capital; iii) Markets and iv) Innovation Ecosystem.

The indicators of the 2019 edition indicate that Bulgaria is performing better in macroeconomic stability, labour market conditions, the financial system and innovation ecosystem. At the same time, there is a need for improvement in infrastructure, healthcare, product market and business dynamism.

Turkey has made significant progress in some dimensions and lost ground in others. The country has made the greatest progress in the field of ICT, infrastructure and the labour market. These improvements, in addition to the large scale of the market (13th position), maintain Turkey's competitiveness. On the other hand, there was a significant deterioration in the macroeconomic environment (-6.1 points, 129th position), caused mainly by higher inflation (13.7%, 132nd position) and, to a lesser extent, a slight decline in the efficiency of the product market (-1.1 points, 78th position), which is mainly due to the lower results in non-tariff barriers (-1.5 points, 79th position). Turkey's success in tackling inflation is seen as a key challenge to improving competitiveness.



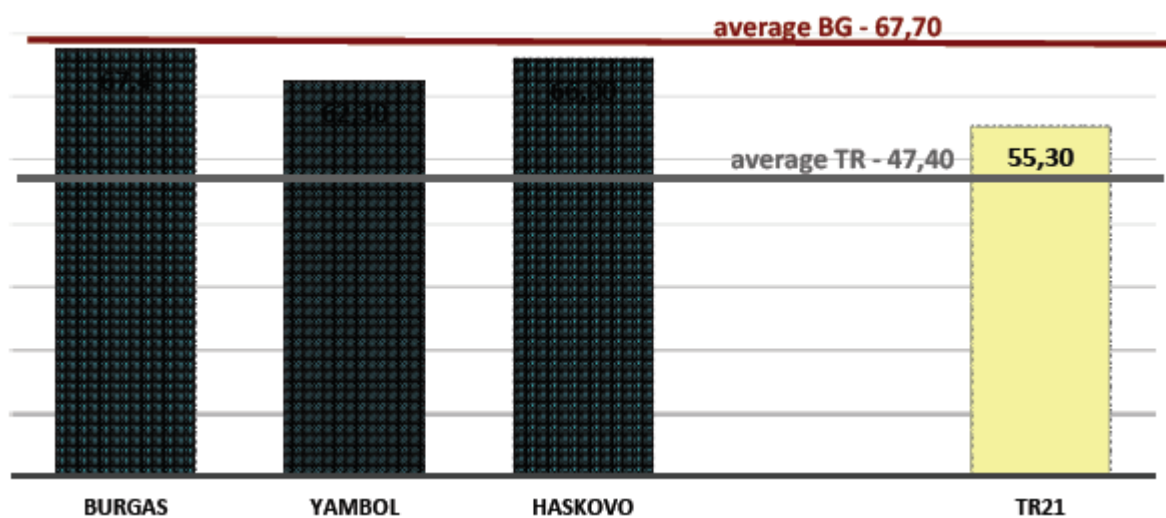
6. LABOUR MARKET

6.1. Employment rate

In the period 2014-2018 (Table 15) the employment rate among the working age population (from 15 to 64 years) in Bulgaria has increased, reaching 67.70% and almost catching up with the EU average. Its current values exceed the pre-crisis level of 2008, when the indicator remained at 64%. The employment rate in Bulgarian cities (70%) is higher than in rural areas (57.4%), with a 70.1% share of men and a 63.1% share of women.

At the district level, the employment rate in Bulgaria is close to, but below the national average, while the Turkish provincial CBC area shows a definitely higher employment rate than the national average (Figure 4).

Figure 4: Employment rate



Source: Territorial analysis of the Bulgaria – Turkey cross border area

The most noticeable increase in the values of the employment rate on the Bulgarian side is observed for Burgas district, while in Yambol district the growth is the most modest and there is a decline for 2018²⁰. The three Bulgarian districts have achieved higher values than those in the Turkish part of the CBC zone.

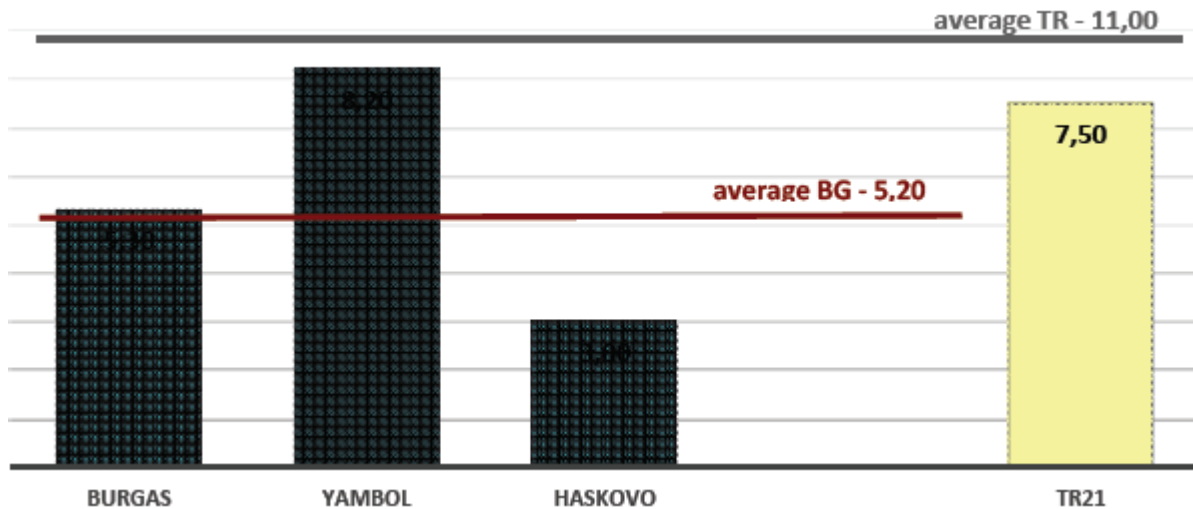
According to 2018 data, the total population over the age of 15 in the TR21 region, which consists of the provinces of Tekirdağ, Edirne and Kırklareli, is 1 461 977, and the total workforce consists of 1 295 806 people. The indicators for the region for the employment rate and unemployment are better than the national average (Table 16).

6.2. Unemployment rate

The unemployment rate shows the relative share of the unemployed in the total number of economically active persons in the population aged 15 to 64. For Bulgaria its value in 2018 reached 5.2% and marked a significant decline of more than 6 percentage points compared to 2014 (Figure 5).

²⁰Territorial analysis of the Bulgaria – Turkey cross-border area

Figure 5: Unemployment rate (%)



Source: Territorial analysis of the Bulgaria – Turkey cross border area

Reported by district, the highest unemployment rate was registered in Yambol (8.2% in 2018), while the data for Burgas and Haskovo districts are similar to the national average (Table 17). There is a significant positive change for Haskovo district, where the high values for the unemployment rate in the period 2010-2013 (13.3% -14.3%) decreased to 3.0%.

Youth unemployment (age group 15 to 24) in Bulgaria decreased to 12.9% in 2017 and shows values, lower than the EU average (16.8%). This positive dynamic is due to the growing employment levels among young people, but it is also a consequence of the decline in the number of economically active people in this age group.

The share of the long-term unemployed (i.e. unemployment for a period of one year or more) decreased from 6.9% (2014) to 3.2% (2018)²¹. Despite this positive trend, most people in this group (55.0% in 2017) have been unemployed for more than a year.

In Turkey, the latest unemployment figures (10.9%) show values still higher than the EU-28 average. Turkey saw a drop in the number of unemployed in 2012, before unemployment rose again in 2018²².

7. SOCIAL INFRASTRUCTURE AND SERVICES

7.1. Healthcare

The analysis does not deepen into consideration the shock of health systems and the negative impact on public health as a whole of the Covid-19 pandemic. On the other hand, it focuses on the recovery period, taking into account that cross-border healthcare relationships are complicated by the legal context in individual countries, which is particularly tangible between a Member State and an EU candidate country.

²¹Territorial analysis of the Bulgaria – Turkey cross-border area

²²Territorial analysis of the Bulgaria – Turkey cross-border area



As of 2017, the existing healthcare system of the border region includes 254 medical institutions and 7 681 beds (Table 18 and Table 19). Their uneven distribution does not provide equal access to health care for all residents, especially for residents of small remote settlements. Declining and aging populations, as well as depopulation of some peripheral areas, poorly maintained transport infrastructure on the periphery and in remote agglomerations, pose difficult challenges for both the health system and regional policy.

The presented data for the province of Edirne show that the number of beds per 10 000 inhabitants is almost twice the national average, which is at the EU average. The data for Kırklareli province are close to those for the whole country and show a need for improvement.

In the Bulgarian part of the CBC region, the number of beds per 100 000 inhabitants for Haskovo and Yambol districts is far below the national average, while the number for Burgas district is very close to the national one. It should be borne in mind that according to this indicator Bulgaria is well above the EU average, by almost 50%.²³It follows that in the Bulgarian CBC area there is no need for a larger number of hospital beds, but better quality of health services.

As of 2017, according to data for the province of Edirne (Table 20), there are a total of 1 070 doctors, of which 503 are specialists, 262 are general practitioners and 305 are assistants. There are a total of 499 doctors in Kırklareli, of which 266 specialists and 233 general practitioners (Table 20).

The data presented for the province of Kırklareli show that the number of inhabitants of a specialist doctor and nurse is above the national average, while the province of Edirne is below these values. The situation is the same with practitioners - the data for both provinces show values below the national average. The number of residents per assistant in the province of Edirne is more than twice the national average. According to the above-mentioned data, it can be concluded that the health care system in the Turkish part of the CBC area is relatively well developed, and in Edirne the provision of health professionals is much better than the national average.

In the Bulgarian side of the CBC region the number of inhabitants per doctor and dentist is above the national average in all three eligible districts, but it should be borne in mind that in this indicator Bulgaria is above the EU average and more than twice well from Turkey.

Bulgarian data show the uneven distribution of health facilities, so a key priority should be to ensure equal access to health services for people, including those living in small, remote settlements, such as the peripheral municipalities of Yambol district. In terms of the number of hospital beds per 100 000 people and the people served by one doctor, the data for the three districts for 2018 show better provision in Burgas district (709 beds, 305 people), compared to Haskovo district (491 beds, 339 people) and in Yambol district (345 beds and 343 people). A traditional problem for Bulgaria is the large imbalance of doctors represented by specialties (Table 21).

Serious risk factors (smoking, alcohol consumption, obesity, unbalanced diet) associated with traditional lifestyles and low levels of physical activity, remain a threat to the health of a large part

²³https://www.oecd-ilibrary.org/docserver/health_glance_eur-2018-en.pdf?expires=1612710009&id=id&accname=quest&checksum=A57B695C1F899CA15A4DB62BA6DAC2BA



of the population.

The most important tasks in the healthcare in the long term are expected to be related to the changing needs of the population in all age groups, the aging population and the rehabilitation of Covid-19 survivors.

7.2. Education

The share of the achieved level of primary and secondary education in the whole area of CBC (Table 22) is slightly above or very close to the average for the respective country. As for the university educational level, the values for the Turkish provinces are relatively close to the national ones, while for the Bulgarian districts they are from 2 to 5 times less than the average values for the country.

The data for the Republic of Turkey for 2018 on the educational status for people aged 15 and over show that the percentage of those, who received at least primary education is 75% for the whole country and 84% for Edirne and Kırklareli.

The average value of the "population aged 25-64 with higher education" (25.6%) in Bulgaria lags behind the EU average (31.4%), and its increase over the period under review is characterized by lower dynamics in compared to the EU average (2.2% compared to 7.2%) The results of the external PISA²⁴ assessment for 2018 are particularly worrying, showing a very low level of knowledge of Bulgarian students compared to their European peers. In response to this challenge, a major and ongoing reform of the Bulgarian education system is currently under way. The results for Turkey are better than the Bulgarian ones, with 466 to 420 points in the reading area, 454 to 436 points in the mathematics area and 468 to 424 points in the natural sciences area.

There are two universities in the Bulgarian part of the CBC region: the Burgas Free University and the University "Prof. Asen Zlatarov". Both are located in Burgas, and there is a branch of the Thracian University (Stara Zagora) in Yambol.

The optimization of the school network in Bulgaria will be carried out by financing the schools for vocational training of national and regional importance, protected professions, according to the needs of the municipalities in the specific region, as well as the introduction of on-the-job training (dual training).

The factors that will influence the trends in the education sector in the future reflect the basic requirements for equal access to quality education at all levels and for all social groups, a better connection between education, science and business.

According to the results of the census of the population of the Republic of Turkey for 2018, the literacy rate for the population over 6 years of age is higher than the average in Turkey (96.97%) for both Edirne (97.51%) and Kırklareli (98.15%) (Table 23).

The percentage of high school or equivalent school graduates (Table 23) is 24.1% in Turkey, 24.97% in Edirne and 26.8% in Kırklareli. For graduates, the percentage is 15.9% in Turkey, 14.34% in Edirne and 14.85% in Kırklareli, or the results are significantly lower than the average for Bulgaria.

²⁴<https://www.oecd.org/pisa/publications/pisa-2018-results.htm>



There are two universities in the Turkish part of the CBC area – Trakya University in Edirne and Kırklareli University in Kırklareli. In addition to the central campus in Edirne, Trakya University has campuses in Havsa, İpsala, Keşan and Uzunköprü. Similarly, in addition to the central campus, Kırklareli University has campuses in the Babaeski, Lüleburgaz, Vize and Pınarhisar districts. In this way, a serious territorial balance has been achieved in the provision of higher education, which is lacking in the Bulgarian part of the CBC zone, as well as in other parts of the country.

The number of academics per 10 000 scientists is higher than the Turkish average. According to the URAR (University Ranking of Academic Results), Trakya University is 74th, Kırklareli University is 142nd among 166 universities in Turkey. In addition, in order to promote the tradition of wrestling among young people, the Academy of Physical Education and Sports Kirkpinar was established at Trakya University.

7.3. Culture and Cultural Heritage

Museums

Within the Bulgarian part of the CBC area there are 24 museums registered under the Cultural Heritage Act²⁵. There are 12 museums in Burgas district, 7 in Haskovo, and 5 in Yambol.

Visits to museums in the district of Burgas in 2017 increased by 10.4% compared to 2016 and reached 230.2 thousand. The number of visits to museums by foreigners increased by 28.4 thousand²⁶.

The most visited are the expositions of the Regional Historical Museum (RHM) in Burgas. They are a thematic division into ethnographic, archaeological, natural and historical exposition. There are also House-Museum "Petya Dubarova", Gallery-Museum "Georgi Baev", Museum of Salt in Pomorie, Municipal Historical Museum - Tsarevo, Historical Museum – Pomorie, Ethnographic Museum – Sozopol, Ethnographic Museum - Nessebar, Archaeological Museum- Sozopol, Archaeological Museum - Nessebar, the Museum on the island of St. Anastasia. In the Banevo district of the city of Burgas, after a successfully implemented project, the Aqua Kalide complex is functioning.

The Archaeological Exposition at RHM-Burgas²⁷ presents archaeological finds from the Thracian times, the Greek colonies on the Black Sea coast and the Roman Empire. A unique collection of exhibits makes it possible to trace the development of shipping in the Black Sea from the earliest times of shipping, during the period of prosperous South Black Sea ports in the Middle Ages.

The ethnographic exposition at the museum offers a rich ethnographic collection presenting the old Burgas with its traditional culture and way of life. There is a colourful collection of Bulgarian folk costumes of ethnographic groups in the area, incl. of the Bulgarian settlers from today's Greece and Turkey. The exhibition is complemented by a collection of women's jewellery - silver, gold, with beads, an integral part of festive clothing.

The natural science exposition presents the geohistorical development and the modern natural

²⁵<https://www.nsi.bg/bg/content/3677/%D0%BC%D1%83%D0%B7%D0%B5%D0%B8-%D0%BF%D0%BE-%D0%BE%D0%B1%D0%BB%D0%B0%D1%81%D1%82%D0%B8>

²⁶<https://www.nsi.bg/tsb/wp-content/uploads/2018/06/Culture-2017-brgs.pdf>

²⁷<https://www.burgas.bg/bg/muzei>



diversity of Southeastern Bulgaria through the unique collections "The Magic World of the Stone", "Flora and Fauna of the Strandzha Mountain", "Bird Resources of the Burgas Wetlands". Many attractive educational programs use the rich information base of the Burgas Natural Science Exposition and contribute to raising the ecological culture of the population and preserving biodiversity. Eco-club, summer eco-school and a competition for the Cup of the Natural History Museum create interest in teenagers and cultivate a love for nature.

RHM Burgas also has a historical exhibition, which presents original exhibits, photos and documents from events and personalities related to the history of the city. The permanent exhibition of icons by the masters of the Bulgarian Revival acquaints visitors with bright examples of this specific art.

There are 5 museums in Yambol district, registered according to the Cultural Heritage Act. The most visited among them are the Regional Historic Museum - Yambol, the Museum of Military Glory and the Revival ethnographic complex Kargon.

Visits to museums in the district in 2017 were 34 thousand and decreased by 7.9% per year. For the same period an increase in the number of visits of foreigners to the museums was registered - by 362, or by 29.2%²⁸.

Haskovo District has 7 museums registered under the Cultural Heritage Act - Regional History Museum - Haskovo, History Museum - Harmanli, History Museum – Dimitrovgrad, the Aleksandrovo Tomb and others. In 2017 the museums in the district were visited by 48 480 people, which is an increase of nearly 20% compared to the previous year²⁹.

In the Turkish part of the CBC area, the museums are concentrated in the cities of Edirne and Kırklareli. The first museum in Edirne was opened under the name Archaeological Museum in 1925 by order of Atatürk in the madrasah Dar-Yul Kura. The building that houses the museum was built together with the Selimiye Mosque between 1569 - 1575 and is the work of Mimar Sinan. In 1936, an ethnographic museum was opened in the courtyard of the Selimiye Mosque. As a result of the continuous enrichment of the collections in 1971, a modern Archaeological and Ethnographic Museum was opened³⁰.

The archaeological exposition shows artifacts from different epochs in the development of the city and its adjacent territory. There is a rich collection of Thracian artifacts found during excavations of tombs and the residence of the Odryian rulers, located 5 km northwest of the city. Collections of Roman and Byzantine coins in chronological order have been added to the exhibited Thracian coins. The Ionian, Corinthian, Byzantine capitals and various architectural elements are displayed in the garden of the museum. The exposition is enriched with a Roman altar with a relief of Eros and dolmens and menhirs, brought from the village of Lalapaşa Hadjilar.

Cultural property seized during attempts to smuggle it across the border is on display in a special display case. There are stelae with images of Thracian horsemen and sculptures from the Roman period. A collection of fossils and bones found in the mines from one million to 30 to 35 million years old have special display cases too.

²⁸<https://www.nsi.bg/tsb/wp-content/uploads/2018/06/Culture-2017-ymbi.pdf>

²⁹<https://www.nsi.bg/bg/content/3677/%D0%BC%D1%83%D0%B7%D0%B5%D0%B8-%D0%BF%D0%BE-%D0%BE%D0%B1%D0%BB%D0%B0%D1%81%D1%82%D0%B8>

³⁰<https://www.ktb.gov.tr/EN-113921/edirne-museum.html>



An ethnographic section shows coins belonging to the Ottoman sultans' periods, a collection consisting of silver works with the sultan's signature, a prayer rug placed in a niche of the Selimiye mosque, and Şarköy carpets, belonging to the 19th century. On display are also spoons made from sea turtle shells, sets of crystal water pipes and men's and women's clothing from the 19th century. Local life is represented by the exposure of rural cuisine, carpets, looms for mats, tools used in the manufacture of footwear, agricultural tools, and carriages.

The Turkish-Islamic works Museum³¹ is located in the courtyard of the Selimiye Mosque. The exhibition includes a wrestlers' room with photos of the wrestling champions from the Kirkpinar Wrestling Championship, a room of objects collected after the closure of the dervish lodges, calligraphic specimens, 2-door wings of the Bayazid Mosque, made with Kyundekari technique, a manuscript presented by Selim II of the Selimiye Mosque and others. There are a large number of items from the Turkish way of life - jugs, bowls of sherbet, coffee sets, hourglass, sundial, kitchen utensils and containers for products, wardrobes, dowry boxes, jewellery boxes, tables inlaid with pearl and more.

The Complex of Sultan Bayezid II Health Museum³² occupies a special place in the cultural landscape of Edirne. The museum complex, located in Edirne, is a unique museum for the country, presenting the history of medicine in the Ottoman Empire. With the help of wax figures, the environment in the medical madrasa and the unknown aspects of medical education from the period are presented. In 2004 the museum wins the prestigious European Council Museum Award³³. In 2005 in Dubrovnik at the "World Meeting of Museums" it was also awarded and admitted to the "Club of Excellence" by the European Heritage Association.

The museum in Kırklareli³⁴ consists of sections, planned for educational purposes - a hall for culture and nature, a section for ethnography and a section for archaeology. The Hall of Culture and Nature presents a collection of 76 stuffed animal species. The ethnography section shows a total of 188 clothes, jewellery and various household items, and the Archaeology section – 72 coins and 236 different archaeological finds.

Cultural Heritage

The cultural heritage is intangible and tangible, immovable and movable heritage and includes a set of cultural values, bearers of historical memory and national identity of scientific and cultural significance.

There are 7 cultural and 3 natural sites in Bulgaria, included in the UNESCO World Heritage List. One of these sites –the Ancient town of Nessebar, is located in the area of CBC, Burgas region. One of the oldest cities in Europe, Nessebar has a rich history³⁵. It began with its emergence as a Thracian settlement more than 3 200 years ago. At the end of the 6th century BC Dorian colonists begin its history as a Greek polis. Evidence of its rich economic, cultural and spiritual life are the numerous finds from this period, presented in the Archaeological Museum. In the following centuries the city came under the rule of various conquerors - Romans, Byzantines, Bulgarians, Turks. The city is especially famous for its 40 churches. The most significant of them

³¹<https://www.ktb.gov.tr/EN-113921/edirne-museum.html>

³²<https://edirne.ktb.gov.tr/TR-90111/sultan-ii-bayezid-kulliyesi-saglik-muzesi.html>

³³<https://europeanforum.museum/winners/council-europe/>

³⁴<https://www.ktb.gov.tr/EN-113973/kirklareli-museum.html>

³⁵https://ancient-nessebar.com/html/main_bg.php?menu=his



are "St. Stefan" and "St. John the Baptist" from the 11th century, "St. Paraskeva" (13th century), "St. Todor" (14th century), "St. Archangels Michael and Gabriel" (14th century), "Christ Pantocrator" (13th – 14th century), "St. John the Unconsecrated" (14th century). In the vicinity of the city active spiritual activity is developed by the monasteries "The Holly Mother of God", "Christ the Acropolis", "St. Peter", "St. Andrew", "St. Ilia", "St. Vlasiy", "St. Nikola Emonski". The unique natural resources and very well preserved monuments from different eras are the reason for the VII session of the World Heritage Committee in Florence in 1983 to include the ancient city of Nessebar in the UNESCO World Heritage List.

The Turkish sites included in the UNESCO World Heritage List are a total of 18 (16 cultural and 2 natural and cultural sites). One of the cultural sites is located in the area of CBC – Selimiye Mosque and its Social Complex (Edirne)³⁶. The complex includes a mosque, madrassas (Islamic schools), a covered market, a clock, an outdoor courtyard and a library. It was built by the architect Sinan between 1569- 1575. The mosque itself is a square building, covered with a dome and has four minarets. The interior is filled with İznik tiles and is an unsurpassed example of this technique.

The interior decoration also includes calligraphy, painted surfaces and stained glass windows. The two madrassas, used as connected museums for religious and ethnographic materials, present the history of the rich social life and culture of the historic city. The covered bazaar, connected to the outer courtyard of the mosque, continues its original function. In the province of Edirne there are also 2 sites from the preliminary list of UNESCO World Heritage - Sultan Bayazid II complex: Medical Treatment centre and Uzunköprü Bridge.

So far, 5 items have been registered in the UNESCO list of the intangible cultural heritage of mankind, traditions and practices related to Bulgaria. Among them is the Firedances, associated with the religious holiday of St Constantine and Elena in the village of Bulgari, Burgas region. It is a traditional ritual in which barefoot dancers perform a dance on a fiery embers. In the 20th century, a commercial resemblance to the ritual was performed for tourists in the seaside resorts on the Bulgarian Black Sea coast. In its authentic form, it has survived in six Bulgarian villages in the Strandzha Mountains: Bulgari, Gramatikovo, Slivarovo, Kondolovo, Kosti and Brodilovo.

Another Bulgarian tradition included in the representative list of UNESCO for intangible cultural heritage are the cultural practices related to the 1st of March. It is associated with wearing of "martenitsa" of white and red thread, symbolizing the reviving life in early spring.

For Turkey, there are 18 registered items on the UNESCO Representative List of the Intangible Cultural Heritage of Humanity, including the Kırkpınar Festival in Edirne, Turkish coffee, Hydrelez and marble paper.

Kırkpınar is a Turkish wrestling tournament (in Turkish: yağlı güreş). It has been held annually since 1360 on the outskirts of Edirne and is one of the oldest wrestling festivals in the world.

A method of making very finely ground coffee, known as "Turkish coffee", is also part of this list. Turkish coffee is brewed in a special pot - cezve and is traditionally served in a special type of small porcelain cup called "kahve fincanı".

The spring celebration "Hidrelez" in Edirne and Kırklareli, is held annually on the 6th of May –the

³⁶<https://whc.unesco.org/en/list/1366/>



Spring Day, or the awakening of nature. To celebrate this occasion, various ceremonies and rituals, related to nature are performed, guaranteeing the well-being, fertility and prosperity of the family and the community and protecting the livestock and the harvest for the coming year.

Marble paper is a method of water surface design that can create patterns, similar to smooth marble or other types of stones. The patterns are the result of a colour floating on plain water and then carefully transferred to an absorbent surface, such as paper or fabric.

The *Via Diagonalis* cultural corridor, connecting Southeast Europe with Asia, passes through the cross-border region. This cultural corridor follows one of the most ancient transcontinental roads. It starts from Central Europe to Slovenia, passes successively through Croatia, Bosnia and Herzegovina, Serbia, Montenegro, Bulgaria and Turkey and continues to the Far East.

One of the branches of *Via Diagonalis*, *Via Pontica*, is a major cultural route stretching along the western and southern coasts of the Black Sea, reaching the foothills of the Caucasus, crossing Romania, Bulgaria and Turkey. Along it are located the cities of Odessos (Varna), Mesembria (Nessebar), Apollonia Pontica (Sozopol), Byzantium (Istanbul), Safranbolu, Trabzon.

7.4. Sport

The existing sports arenas, stadiums and facilities for mass sports in the Bulgarian part of the CBC area are designed to meet the needs of different economic, social and demographic realities and do not meet the highest standards of safety and comfort, provided in the currently applicable regulations. The largest sports arena in the Bulgarian part of the CBC region will be Arena Burgas, a multifunctional sports hall under construction in the town of Burgas with a capacity of over 7 000 seats.

According to the register kept by the Ministry of Youth and Sports, there are 116 swimming pools in Bulgaria, 39 of which are indoor, and 138 in sports halls and centres. In the Bulgarian CBC zone 11 halls and sports centres and 8 swimming pools are located there, 2 of which are indoor (Table 24).

According to the National Statistic Institute (NSI) data for the 2017/2018 school year, over 70% of school buildings have halls or other facilities that allow for the normal practice of school sports. The established low levels of physical activity in all age groups in Bulgaria require an active governmental and municipal policy to ensure good conditions for mass sports and to promote the sports activity of the population.

In Turkey, the number of youth centres and gyms is assessed as satisfactory, but the construction of such facilities continues. The contribution of sports and sport tourism to economic growth is increasing. The main weaknesses in this sector are due to the concentration of interest in sports in certain areas³⁷.

Edirne Province has 3 youth centres and 13 stadiums for sports such as football, basketball, volleyball and more. The number is similar in Kırklareli Province - 4 youth centres and 11 stadiums (Table 25).

According to data for 2018 (Table 26), there are 30 177 licensed sports practitioners in Edirne and the percentage of women athletes is 39.3%. There are 20 583 licensed sports practitioners

³⁷Ministry of Youth and Sport. Strategic Report 2019-2023, <http://en.gsb.gov.tr>



in Kırklareli, and the percentage of women athletes is 40.6%. In Turkey as a whole, the total number of licensed athletes is 4 907 955, and the share of women is 33.6%.

8. ENVIRONMENT

8.1. Ambient air

The data for 2018 for the districts of Burgas and Haskovo show exceeding the established norms for ambient air quality indicators for particulate matter 10 micrometers or less in diameter (PM₁₀). In both areas the number of registered exceedances of the average daily value is higher than the set norms. According to the available data, most of the days with registered over-concentrations of PM₁₀ are during the winter months and are related to the heating season.

The reported levels of concentration in the air for all other pollutants (sulfur dioxide - SO₂, particulate matter - PM₂₅ and ozone - O₃) for the districts of Burgas and Haskovo are in accordance with the regulatory requirements (Table 27).

The Yambol district is not monitored for the above air quality indicators.

The data for pollutants observed in the districts of Edirne and Kırklareli and compared to those on the Bulgarian side are for particulate matter PM₁₀ and sulphur dioxide SO₂. The information on the reported levels of sulphur dioxide shows similar results with the Bulgarian ones - low values with single locations at higher values (Table 28). In the case of particulate matter - PM₁₀, the results from the Turkish side show a higher concentration.

8.2. Waters

For the period from 1996 to 2016 there is a steady trend of improving the basic physico-chemical parameters of surface waters in Bulgaria. In contrast, taking into account the objectives for good status of the biological assessment indicator, satisfactory results were not achieved in 65% of the water bodies in the “lake” category and in 57% of those in the “river” category.

During the same period, there is a gradual improvement in most indicators for monitoring groundwater quality. The main pollutants of groundwater are nitrates – in approximately 21% of the observed points, average annual values above the limit were found.

Individual exceedances of the content of heavy metals in groundwater, mostly unstable over time, have been reported.

In general, the sea waters along the Bulgarian coast adjacent to the Turkish coast are classified with good ecological status. A part of the Burgas Bay is in moderate condition.

The water bodies BG2BS000C1008 cape Emine - St. Vlas, BG2BS000C1108 St. Vlas - Pomorie, BG2BS000C1208 Pomorie - Sarafovo, BG2BS000C1010 Burgas Bay and BG2BS000C1011 Cape Akin and Cape Maslen nos are classified with good ecological status in the eligible for CBC zone. Only BG2BS000C1010 South Burgas Bay has a moderate ecological status.

Typical for the Turkish side problems with water pollution and reducing the quality of water resources in the country are their excessive use, untreated industrial and domestic wastewater, unplanned and rapid urbanization, insufficient capacity of existing wastewater treatment facilities and agricultural activities. (The state of the environment for the Republic of Turkey, 2016 report).



8.3. Protected areas and biodiversity

According to information from the Executive Environment Agency³⁸, 1015 protected areas are currently declared in Bulgaria. The area covered by them at the national level is 5.3% of the country's territory. According to the Protected Areas Act, they are divided into 6 categories: reserves (55), national parks (3), natural landmarks (348), maintained reserves (35), nature parks (11), protected areas (563).

Map 3: Natura 2000 Sites in Bulgaria



Source: Natura 2000 Network Viewer³⁹

The European ecological network NATURA 2000 is extremely well represented on the territory of Bulgaria. By the Council of Ministers decisions, 119 protected areas for protection of wild birds, covering 22.7% of the territory of Bulgaria and 234 protected areas for protection of the habitats of the wild flora and fauna, covering 30% of the territory of Bulgaria were adopted (Map 3). The total area of Natura 2000 protected zones, taking into account the overlap, is 34.4% of the country's territory. These data rank the National Ecological Network of Bulgaria (NEN) in third place in the EU.

The Audit report⁴⁰ of the National Audit Office on the implementation of "Management of the NATURA 2000 network in order to protect the environment and the local population in the network areas" found a delay in the orders for the declaration of a large part of the protected areas of the Natura 2000 network by the Ministry of Environment and Water. Due to this delay, no regimes have been set for their protection and management.

³⁸<http://eea.government.bg/bg/bio/nem>

³⁹<https://natura2000.eea.europa.eu/>

⁴⁰www.bulnao.government.bg; od-natura-231219



Burgas District has one of the highest percentages by area of protected sites (17.14%), while protected sites in Haskovo and Yambol cover less than 1% of the total area⁴¹. Malko Tarnovo is one of the five municipalities in Bulgaria where the protected sites cover over 99% of the total area.

The significant share of the NEN sites is a proof of the rich biodiversity on the territory of the country and of the will to take measures for its protection. In economic terms, this favours the development of educational and ecotourism.

The serious potential of protection measures to limit a range of human activities within protected areas and to create a risk of underestimating the social and economic aspects of development at the expense of environmental ones, requires a careful and science-based approach to all aspects of territorial policies. This risk is most pronounced at the municipal level, especially where almost the entire territory of the municipality is covered by NEN. In order to eliminate such negative effects of the biodiversity conservation policies in the relevant European legislation^{42,43} measures have been taken to consider in a holistic manner the environmental, scientific, cultural, economic, social and recreational requirements, as well as regional and local characteristics. This complex approach to biodiversity conservation predetermines the need for specific research, assessments and policies.

Strandzha Nature Park⁴⁴, established in 1995 in the Bulgarian part, is the largest protected area in Bulgaria, covering 1 161 km². There can be observed 50% of the flora of Bulgaria - the region has 121 habitat types. The mountain has a karst terrain, with steep limestone rocks, many mineral springs and complex cave systems. Within the boundaries of the Nature park the reserves "Vitanovo" (1 112.4 ha), "Lopushna" (2 581.5 ha), "Sredoka" (607.8 ha), "Tisovitsa" (749.3 ha) and "Silkosa" (396 ha) are located. There are 14 more protected areas and 7 natural landmarks. Strandzha Nature Park offers a wide selection of tourist products at an exceptional level.

The Turkish part of the CBC region also has a number of nature parks and protected areas. Gala Lake National Park in Turkey is located in Edirne Province, Kasatura Korfezi Nature Reserve and Saka Lake Nature Reserve are located in Kırklareli Province.

İğneada Floodplain Forests is a national park, located in the province of Kırklareli. Established in 2007 it covers an area of 3 155 ha (7 800 acres). The national park is an ecosystem consisting of a swamp, five lakes and coastal sand dunes.

Lake Gala National Park, established in 2005, is located in the province of Edirne. It covers an area consisting of Lake Pamuklu and Lake Kyuchuk Gala and is an ecosystem of 3 090 ha (7 600 acres) of wetland, a lake and 3 000 ha (7 400 acres) of forest.

Due to its geographical location and territorial scope Turkey is rich in flora and fauna. The main reasons for this are the different types of climatic features and ecosystems, as well as the migration routes, passing through the territory of the country.

⁴¹Territorial analysis of the Bulgaria – Turkey cross-border area

⁴²<https://eur-lex.europa.eu/legal-content/BG/TXT/PDF/?uri=CELEX:32009L0147&from=BG>

⁴³<https://eur-lex.europa.eu/legal-content/BG/TXT/PDF/?uri=CELEX:31992L0043&from=BG>

⁴⁴<https://www.strandja.bg/>



The rich Turkish flora includes over 9 000 species of plants. About 3 000 of them are endemic to Turkey and are not found in nature anywhere else in the world. Turkey is the centre of origin of more than 30 types of fruits, and also one of the most important plant genetic sources in the world, especially for cereals and legumes. The country has a rich fauna, presented by over 40 000 animal species.

Some of the main environmental problems in the area are related to the Black Sea marine environment - a habitat for 168 species of fish, four different marine mammals and thousands of plants. These problems contribute to the reduction of biological resources, biodiversity, fish stocks and others. The main reasons for this are pollution, irresponsible fishing and eutrophication.

8.4. Climate change

Climate change is an important factor with increasing impact on the state of the environment. The process is strongly stimulated by the main activities and consumption patterns of society, exacerbated by the lack or slow pace of the process of implementing mitigation strategies and policies. Climate change is considered to be one of the greatest and deepest challenges facing humanity, as it is linked to the global impact on the economic, social and environmental components of social development.

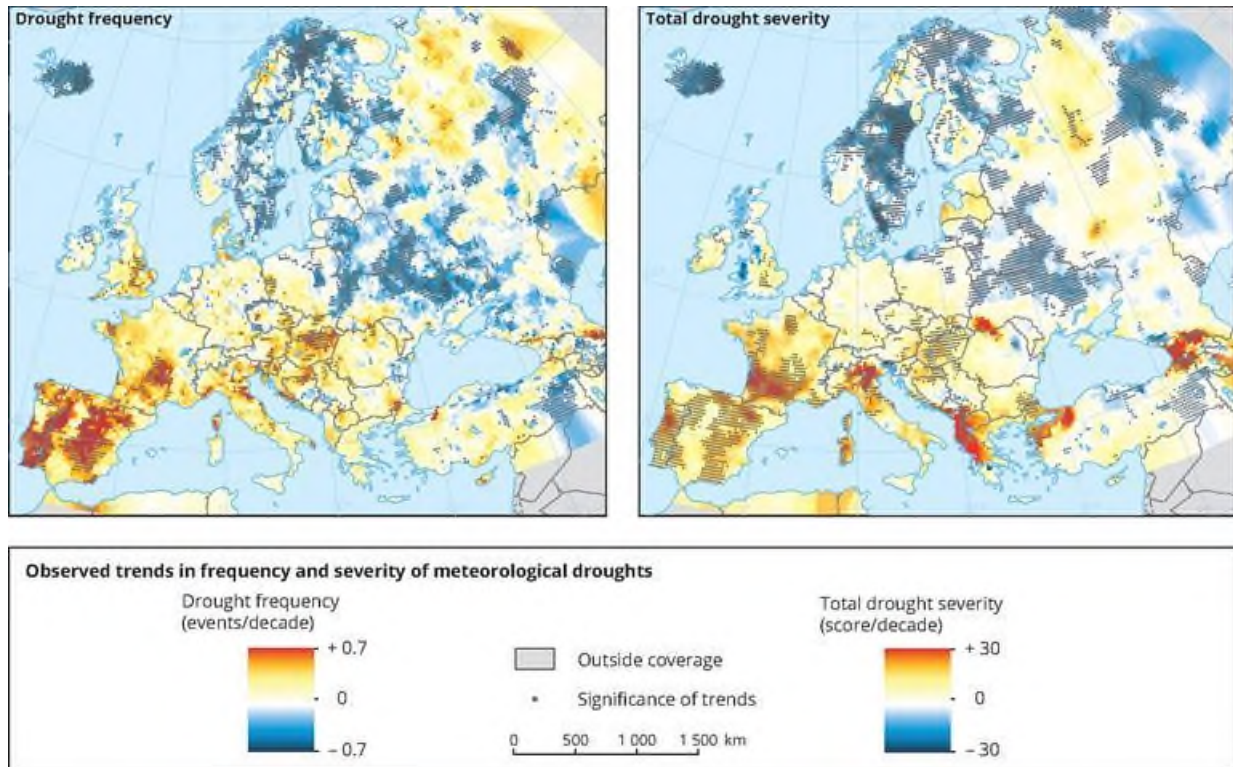
Numerous analyses, assessments and scenarios by national and international institutions and experts place Bulgaria and Turkey among the countries in which the climate change will have a significant impact. Factors, that are expected to adversely affect human health, the environment, biodiversity and economic growth include extreme temperatures, droughts, higher frequency and intensity of rainfall, torrential rains and related processes and disasters. There has been an increase in the frequency of natural disasters in recent years.

The whole CBC area is assessed as a region in need of special strengthening of measures for adaptation to climate change.

8.5. Droughts

One of the main consequences of climate change is long periods of meteorological and hydrological droughts and reduction of soil moisture. According to the available data, the analysed region is characterized by a slightly higher frequency of drought, which makes it prone to more serious negative impacts from climate change (Map4). The frequency of dry years registered in Bulgaria and especially in the Thracian lowlands is increasing, while the frequency of rainy years is decreasing.

Map 4: Observed trends in frequency and severity of meteorological droughts



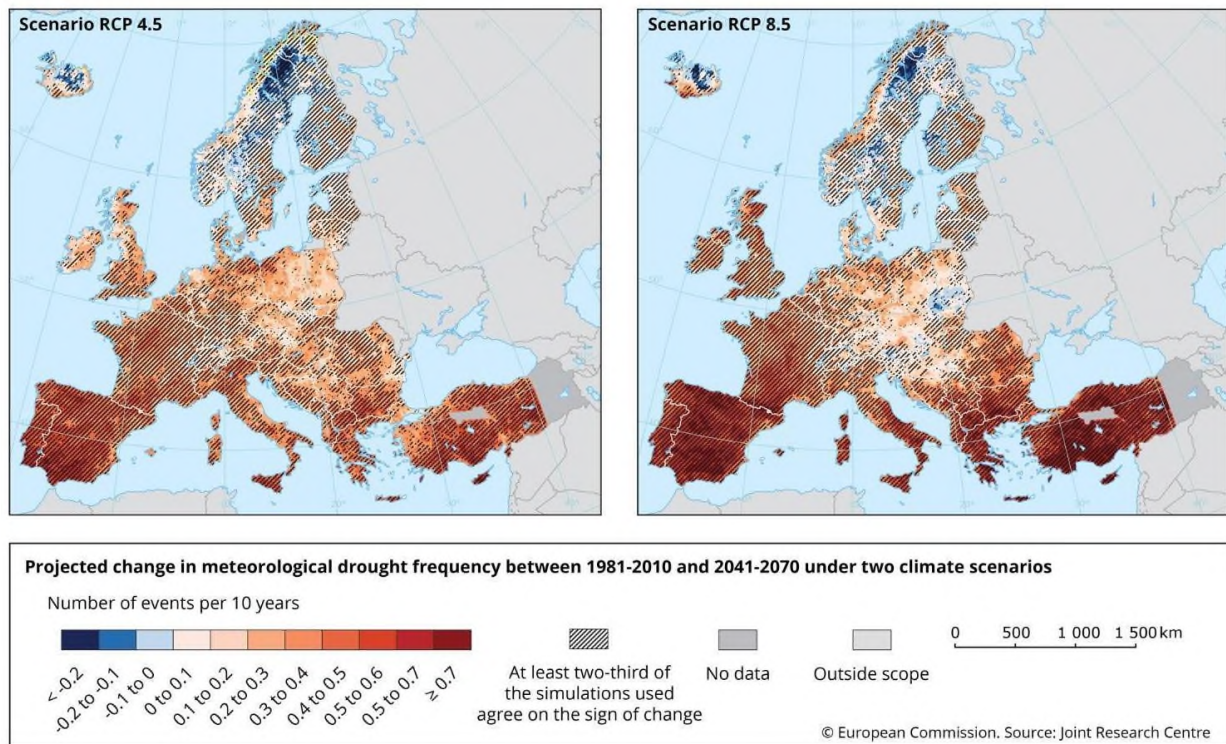
Source: Observed trends in frequency and severity of meteorological droughts⁴⁵

According to two of the four scenarios developed by the Intergovernmental Panel on Climate Change (Map 5), the area covered by the CBC region is highly susceptible to drought caused by climate change. Mitigating the negative effects of climate change depends entirely on the ability of national and local authorities to develop and implement strategies and a series of adaptive measures.

Map 5: Projected change in meteorological drought frequency between the present (1981-

⁴⁵<https://www.eea.europa.eu/data-and-maps/figures/observed-trends-in-frequency-and>

2010) and the mid-century 21st century (2041-2070) in Europe, under two emissions scenarios



Source: Projected change in meteorological drought frequency between the present (1981-2010) and the mid-century 21st century (2041-2070) in Europe, under two emissions scenarios⁴⁶

8.6. Forests fires

Forest fires occur as a result of self-ignition of dry grass, natural phenomena (lightning), irresponsible human behaviour, related to fire handling, such as uncontrolled burning of household waste, burning of stubble and others. The ecological consequences of forest fires are deforestation and soil erosion, destruction of unique habitats of rare and protected species, air pollution. From an economic point of view, they are most often associated with the loss of timber and the need for resources to restore the burned areas. In social terms, they lead to deteriorating business conditions, a decline in the tourism sector, depopulation of the affected countries, and sometimes endangering the health and lives of the population.

From the available data (Table 29, Table 30) it can be concluded that in recent years the CBC area on both sides of the border is facing a declining number and low risk of forest fires. However, data for a longer period of time show that forest fires (especially in the Burgas region) are not uncommon and their underestimation can have serious consequences.

8.7. Landslides

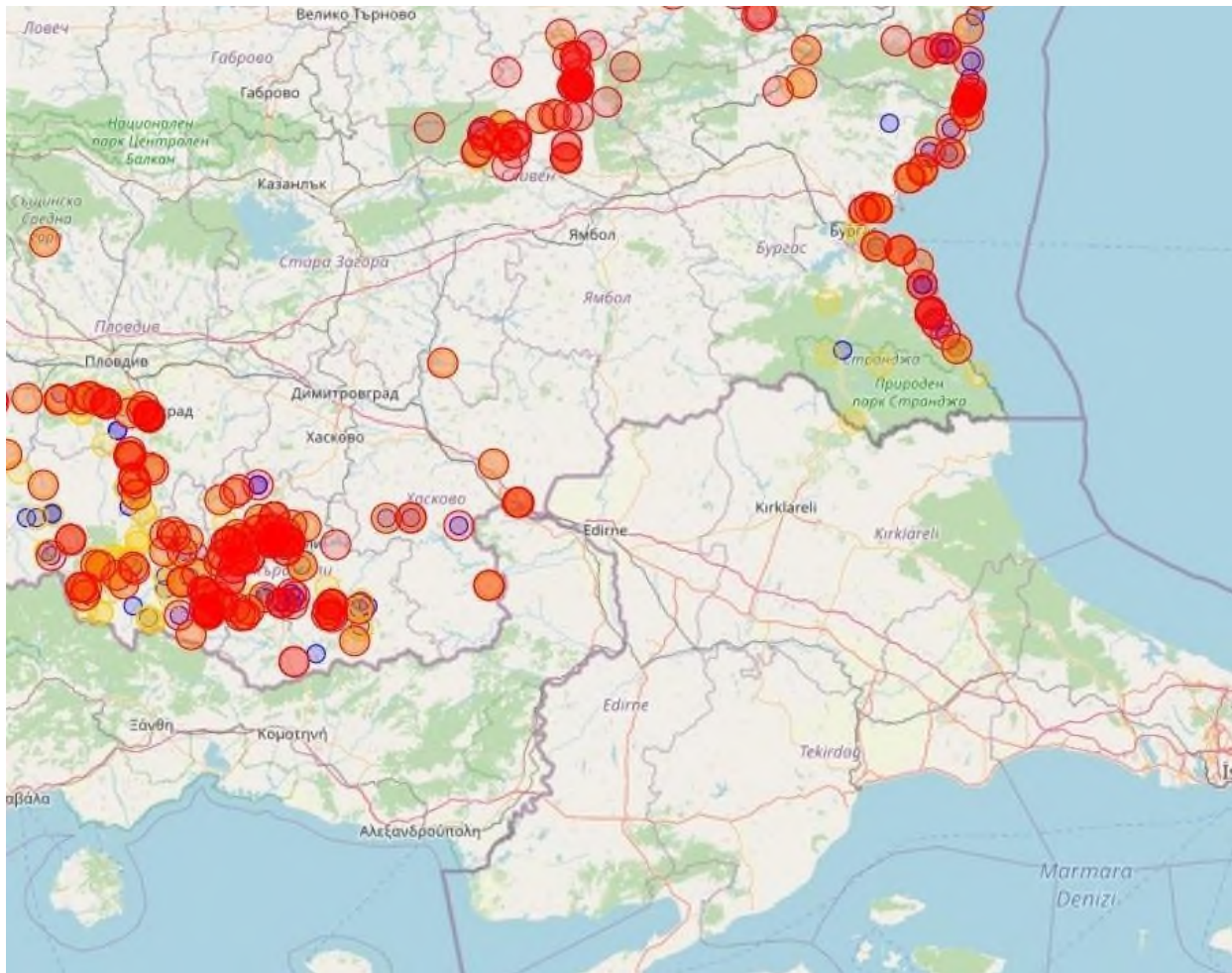
Heavy rains and human activities contribute to the activation of landslides in Bulgaria. Landslide

⁴⁶<https://www.eea.europa.eu/data-and-maps/indicators/river-flow-drought-3/assessment>

processes are most pronounced along the Danube and along the Black Sea coast.

The Bulgarian CBC region is characterized by moderate to weak development of landslides. The most affected by these processes are the coast north of Burgas and the mountainous part of the Eastern Balkan Mountains (Map 6). The lowlands and valleys of the region have the least landslides.

Map 6: Map of landslides in Bulgaria



Source: Map of landslides^{47,48}

According to the available information, Edirne and Kırklareli are low-risk cities in terms of landslides, rock falls and avalanches⁴⁹. The low level of risk facilitates the design and construction of infrastructure projects.

8.8. Seismic hazard

The territory of Bulgaria and the European part of Turkey is located in the Aegean seismic zone,

⁴⁷<http://gz-varna.mrrb.government.bg/map/>

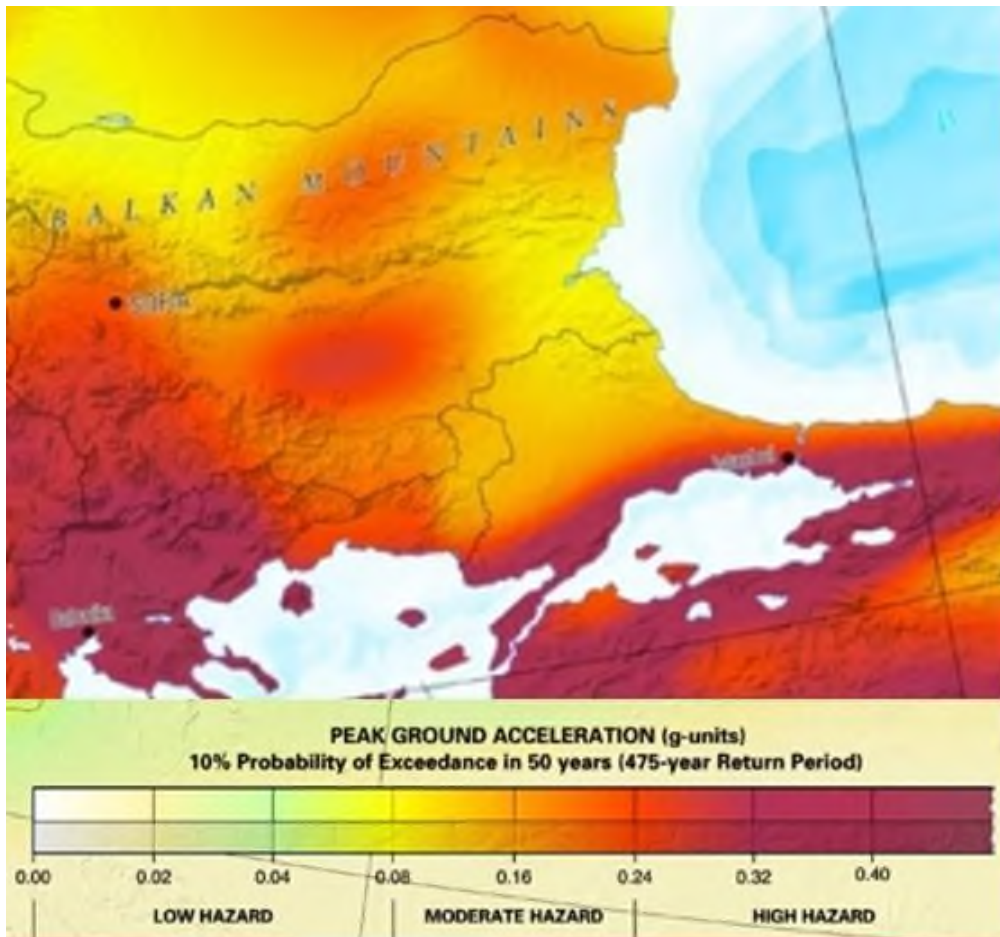
⁴⁸<http://gz-pernik.mrrb.government.bg/map/>

⁴⁹Territorial analysis of the Bulgaria – Turkey cross-border area

which is part of the Mediterranean earthquake area. The probability of significant adverse effects, even in weaker earthquakes, is associated with the relatively high population density and high density of construction in large settlements.

Earthquakes in Bulgaria are among the most dangerous natural disasters, as 97% of the country's territory is threatened by seismic impact (Map 7).

Map 7: Seismic hazard map



Source: European-Mediterranean seismic hazard map⁵⁰

Although the three Bulgarian districts falling within the CBC zone do not belong to the most earthquake-vulnerable regions in the country, they are exposed to a relatively high seismic risk.

Most of the area on the Turkish side has some of the lowest seismic risk values for Turkey, but comparable to that on the other side of the border. An exception is the coast of the province of Edirne.

8.9. Waste management

The circular economy is a model for sustainable waste management adopted by the European

⁵⁰<https://www.preventionweb.net/organizations/85/view>



Commission⁵¹. Plans for its implementation include preventive measures such as sustainable product design, expanding the rights of consumers with the right to repair goods and reducing the consumption of raw materials, as well as a number of measures for waste collection and recycling.

In Bulgaria, the amount of collected household waste per capita in the period 2011-2017 is increasing, taking into account the gradual increase in the share of the population served by organized waste collection systems throughout the country. The data show lower than the national average of the collected household waste per person in the districts of Burgas, Yambol and Haskovo⁵².

The values of the average amount of household waste per capita in Edirne and Kırklareli are higher than those for the country, as for the province of Edirne a decrease in the average amount of waste per capita for the period 2012-2018 is reported⁵³. The percentage of the population using waste services in 2018 is lower than the national average, both in Edirne and in Kırklareli.

For the whole territory of Bulgaria for the period 2011-2017 there is a positive trend in waste management, expressed in a decrease in household waste sent for disposal and an increase in those sent for pre-treatment. The reduction in the number of landfills and the area of landfills, reported throughout the country, shows a steady trend for better implementation of the basic principles of waste management by reducing their volume, reuse and recycling.

The study held in 2016 by the Regional Environmental centre in Turkey on the rate of recycling of municipal waste in Turkey, shows that a small part of municipal waste in Edirne and Kırklareli is recycled. In comparison, the capital, Ankara, recycles the most in the country - just over half of the collected waste.

The main guidelines⁵⁴ for achieving the ambitious goals of the EU in the field of waste management are related to reducing the share of municipal waste that can be disposed of in landfills, recycling of biodegradable waste as compost at home or its separate collection, collection of unsold food and their safe redistribution. Improvements in the waste recycling process are expected to benefit the environment, climate and human health.

⁵¹<https://www.europarl.europa.eu/news/bg/headlines/economy/20151201STO05603/krghovata-ikonomika-kakvo-predstavliava-tia-i-zashcho-e-vazhna>

⁵²Territorial analysis of the Bulgaria – Turkey cross-border area

⁵³Territorial analysis of the Bulgaria – Turkey cross-border area

⁵⁴<https://www.europarl.europa.eu/news/bg/headlines/priorities/namaliavane-na-otpadtsite/20180411IPR01518/krghovata-ikonomika-poviechie-rietsikliranie-na-domakinski-otpadtsi-po-malko-smietishcha>

9. INFRASTRUCTURE

TEN-T

One of the main corridors of the European transport network TEN-T with extensions to third countries passes through the territory of the CBC Bulgaria-Turkey region - the Orient/East-Mediterranean corridor, which connects Northern Germany (Hamburg-Berlin) with Eastern Europe, Budapest-Timisoara-Craiova-Sofia) and Southeastern Europe (Sofia-Plovdiv-Svilengrad-Turkish border) (Map 8, Map 9).

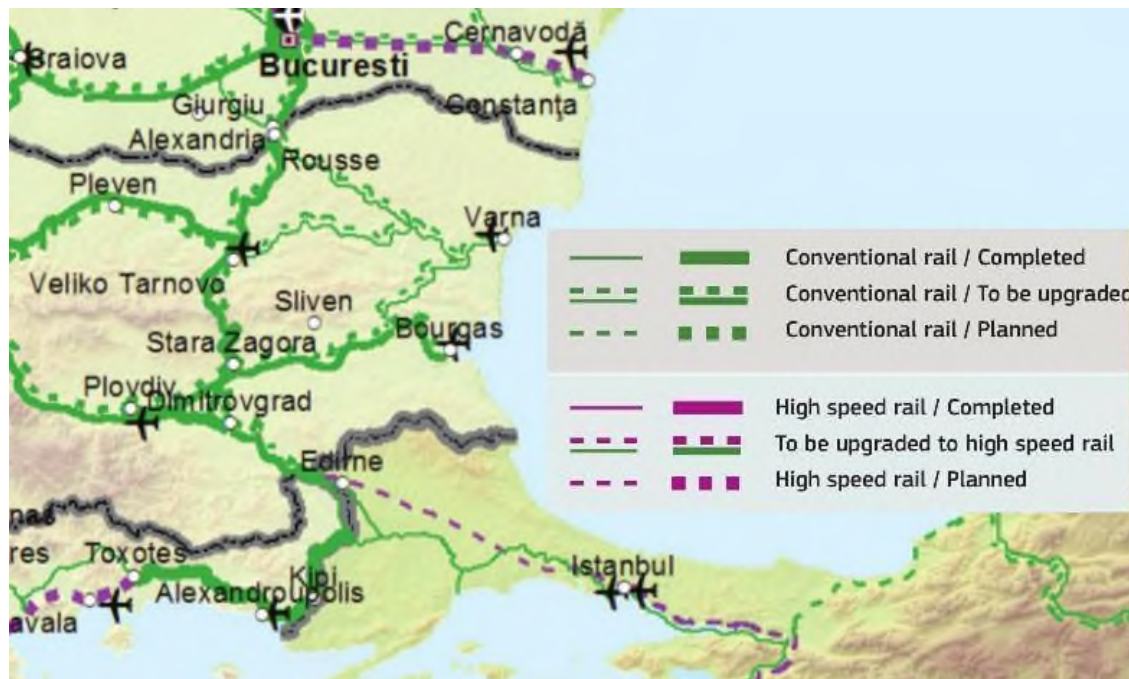
Map 8: Trans-European transport network – roads, ports, rail-road terminals, airports



Source: Trans-European transport network – Indicative extension to neighbouring countries⁵⁵

⁵⁵https://ec.europa.eu/transport/infrastructure/tentec/tentec-portal/site/maps_upload/annexes/annex3/Annex%20III%20-%20VOL%2033.pdf

Map 9: Trans-European transport network – railways and airports



Source: Trans-European transport network – Indicative extension to neighbouring countries⁵⁶

Road network

The Bulgarian CBC region is served by two motorways, forming the direction of the corridor "Orient/Eastern-Mediterranean" – "Trakia" motorway – Sofia – Plovdiv – Burgas and the motorway "Maritsa" from the road junction Orizovo ("Trakia" motorway) to Kapitan Andreevo. Maritsa motorway conducts transit traffic flows from Europe to the Republic of Turkey and is the main transport axis for the CBC region, connecting the important centres of Haskovo and Edirne (Map 10).

The Black Sea motorway (Burgas – Varna) has not yet been built, but together with the planned Varna – Durankulak – Romania border link, it is included in the extended TEN-T network in the country and will provide another fast connection of the CBC region with the Republic of Romania.

Important for the transport service of the CBC area are the following first-class roads, conducting the main transport flows through the border checkpoints:

- First class road I-5 border Romania/Border checkpoint "Ruse – Veliko Tarnovo – Stara Zagora – Haskovo – Kardzhali – border Greece (E-85) is part of the core TEN-T network in the country and conducts transit flows between the Republic of Romania and the Republic of Turkey/R. Greece, serving mainly the westernmost part of the CBC region.
- First-class road I-7 border Romania/Silistra – Shumen – Yambol – Elhovo border checkpoint – Lesovo – Hamzabeyli border checkpoint/Turkey border does not fall within the covered TEN-

⁵⁶https://ec.europa.eu/transport/infrastructure/tentec/tentec-portal/site/maps_upload/annexes/annex3/Annex%20III%20-%20VOL%2033.pdf



T, but is an important direction conducting transit flows between the Republic of Romania and the Republic of Turkey.

- First class road I-9 border Romania/border checkpoint "Durankulak" –Varna–Bourgas–border checkpoint "Malko Tarnovo"/borderTurkey (E-87) – serves the tourist flow along the Black Sea coast, but south of Bourgas conducts mainly transit traffic to/from R. Turkey.
- First class road I-6 border Macedonia/border checkpoint "Gueshevo"–Kyustendil–Radomir–Sofia–Karlovo–Kazanlak–Burgas serves peripherally the northernmost part of the CBC region.
- The second-class road II-99 (Burgas–Marinka)–Sozopol–Primorsko–Tsarevo–Malko–Tarnovo–border Turkey serves the Black Sea coast from the CBC area with cross-border connection with the Republic of Turkey.
- The analysis of the structure of the road network in the Bulgarian part of the CBC programme zone shows a relatively high share of motorways and first-class roads in all three districts (Table 31).

The well-maintained road network for the whole country is about 40%, both in the previous programming period 2007-2013 and in the period 2013-2017. As of 31.12.2019 all three districts in the eligible CBC area have maintained below 50% from its road network in good condition (Table 32). The trend is negative for the districts of Haskovo and Burgas, where only about a third of the national road network is in good condition.

The actual transport services of the municipalities are provided by the municipal road network, which provides the connections of the settlements in the municipality with the municipal centre, the connections with the settlements in the neighbouring municipalities or access to national transport infrastructure facilities (railway stations, ports, container terminals, etc.).

The group of roads of regional importance is formed by II and III class roads, whose functions are to provide connections between the major administrative and economic centres in the CBC area by facilitating its integration.

Difficult transport access in less developed peripheral areas leads to a lack of effective economic activity, high levels of unemployment, a process of depopulation of settlements and insufficient provision of public services.

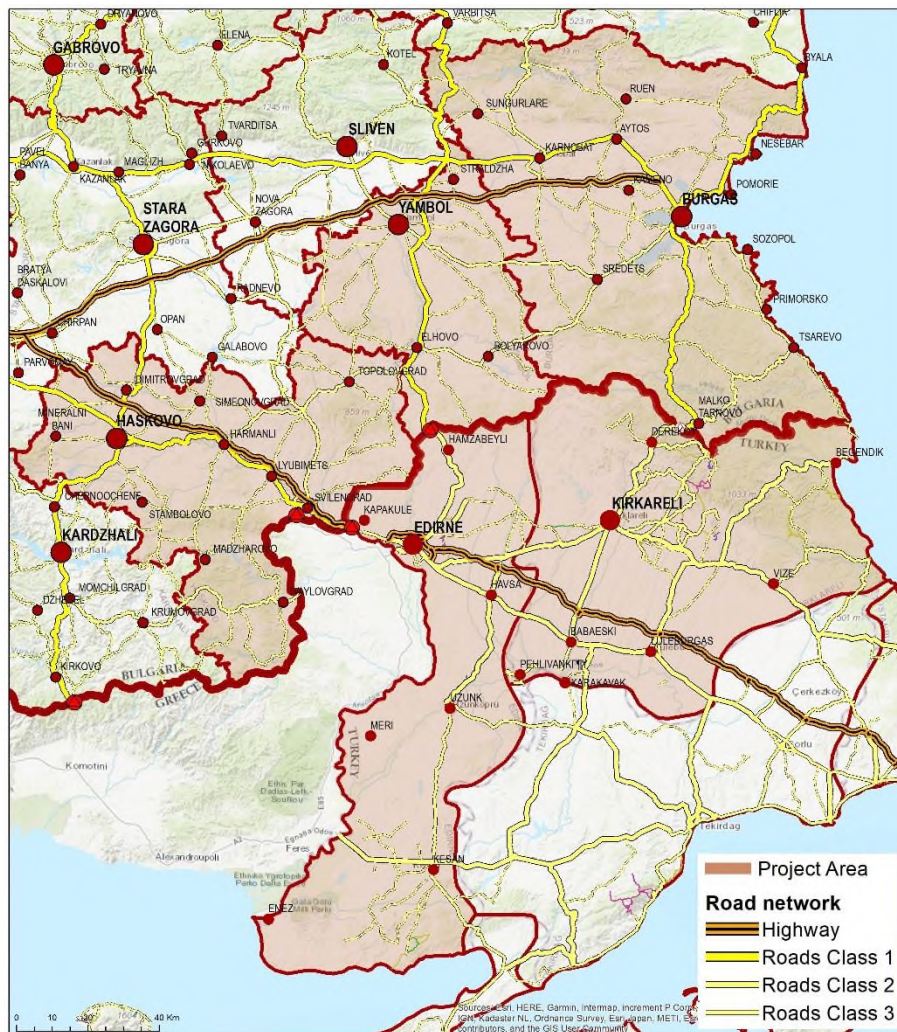
The O-3 motorway in Turkey connects the Edirne and Kırklareli provinces with Istanbul.

- State road D100 - starts from Kapıkule - border checkpoint on the border with Bulgaria, and ends at Gürbulak - border checkpoint on the border with Iran, crossing Turkey from west to east. In the European part of Turkey, the road runs parallel to the O-3 motorway to Istanbul and collects the flow of smaller local roads, which determines its importance for the region.
- State road D110 - starts from the border with Greece, near İpsala, and reaches the intersection with D.100 in Kinal. The main road to Greece, the route is a four-lane motorway, except for the two-lane bridge crossing the Maritsa River. Its function at the level of the Thrace region is important, as it is the main collection artery for the roads of the municipal level in the southern part of the region.

- State road D550 - starts as a detour from the O-3 motorway near Haskoy (Edirne province) and ends in southwestern Turkey (Mugla). It passes from north to south through the European part of the country and connects the important for the region cities of Uzunköprü and Keşan with the O-3 motorway. By ferry it passes to the Asian part of Turkey and continues along the Aegean coast to the town of Mugla.
- State road D555 - starts at Dereköy border checkpoint at the Bulgaria-Turkey border crossing and ends at Tekirdag at the D.110 junction. It performs the important function for CBC area to connect Kırklareli and the port and airport of Burgas with the O-3 motorway.
- State road D020 - starts from Edirne and connects Kırklareli, Pınarhisar, Vize, Saray and through its transition to D567 and Kapakli and Cherkezkoy with the motorway O-3. It is a main road artery, collecting the flows from the smaller local roads northeast of the O-3 motorway.

The well-developed system creates opportunities for mobility between regional centres and gives the cross-border area a more favourable position for integration at both national and European level. The total length of regional and state roads in Edirne is 676 km, and in Kırklareli 537 km (a total of 65 174 km in Turkey) (Table 33).

Map 10: Road map of cross-border region





Railway network

There are 4 030 km of railway lines operating on the territory of Bulgaria (2019), of which 436 km are in the cross-border area. The TEN-T network includes the following main lines of the national railway infrastructure, passing through the CBC region:

- Railway line 1 Kalotina-west (border with the Republic of Serbia) - Sofia - Plovdiv - Dimitrovgrad - Svilengrad (borders with the Republic of Greece and the Republic of Turkey). The line forms part of the transport corridor of the main TEN-T network "Orient/Eastern Mediterranean" and conducts transit flows between Europe and the Republic of Turkey.
- Railway line 8 Plovdiv-Filipovo-Skutare and Plovdiv-Distribution East-Stara Zagora-Yambol-Zimnitsa-Karnobat-Burgas also forms part of the corridor of the core TEN-T network "Orient/East-Mediterranean" in the section Plovdiv-Distribution East-Burgas.

The highest density of the railway network is in Haskovo district - higher than the national average, but the smaller number of stations assumes more limited access to the railway network. The worst served by rail is the district of Yambol (Table 34).

The main railways as part of the infrastructure of the TEN-T ensure the integration of the country's railway network with that of neighbouring countries. Spatially, they are important for the integration of the territory, both nationally and in the European space. They provide access to ports, airports of international importance, as well as connections between major urban centres, incl. the capital.

The existing railway infrastructure on the Turkish side connects the Kapitan Andreevo– Kapıkule border checkpoint with Istanbul (Map 9). Its branches lead to Kırklareli, Tekirdag and the Greek border.

The planned large-scale public investment in transport in Turkey is focused on high-speed railways and motorways. Important transport investments are planned on the line from İstanbul to the border. The section of the Halkalı - Kapıkule high-speed railway project (with EU funds) was signed on 11 June 2019, with an investment of € 1.1 billion. The Halkalı– Kapıkule railway line will provide a fast rail link between Europe and Asia.

EuroVelo – European network of bicycle routes

One of the European bicycle routes - EuroVelo 13 Trail- Iron Curtain Trail, passes through the CBC area. The cycling route starts in Northern Finland, passes near the Baltic coast, and through Germany, the Czech Republic, Slovakia and Romania, ends in the small Black Sea town of Rezovo (Bulgaria), connecting over 20 countries (Map 11).

EuroVelo routes aim to stimulate cross-border tourism and connect places with important natural or cultural heritage. So far, the part of the EuroVelo corridor passing through Turkey and Bulgaria is not developed properly.

The projects, implemented within previous periods of the IPA Bulgaria-Turkey Cross-Border Cooperation Programme have created new cycling routes in the CBC region.

One of them - the project "Active tourism in Strandzha and Sakar", aims to unite and develop a network of bicycle routes. The network includes a ten-day route, starting from the westernmost point of the Bulgarian border near Svilengrad through the Bulgarian part of Strandzha and Sakar,



crossing the border after the town of Malko Tarnovo and entering the Turkish part of Strandzha. The route reaches the Black Sea near the village of Kıyıköy and from there moves west through the towns of Kırklareli, Edirne and Svilengrad.

Map 11: EuroVelo 13 in Bulgaria and Turkey



Source: EuroVelo 13 – Iron Curtain Trail⁵⁷

Airports

The only international civil airport in the cross-border area is Burgas Airport, which is included in the extended TEN-T network. Its annual capacity is 2 700 000 passengers. Burgas Airport is characterized by summer seasonality, as the main part of passenger service activities between June and September. The airport also handles cargo, including specialized cargo, performing the intermodal transport functions of the Burgas junction as part of the core TEN-T network.

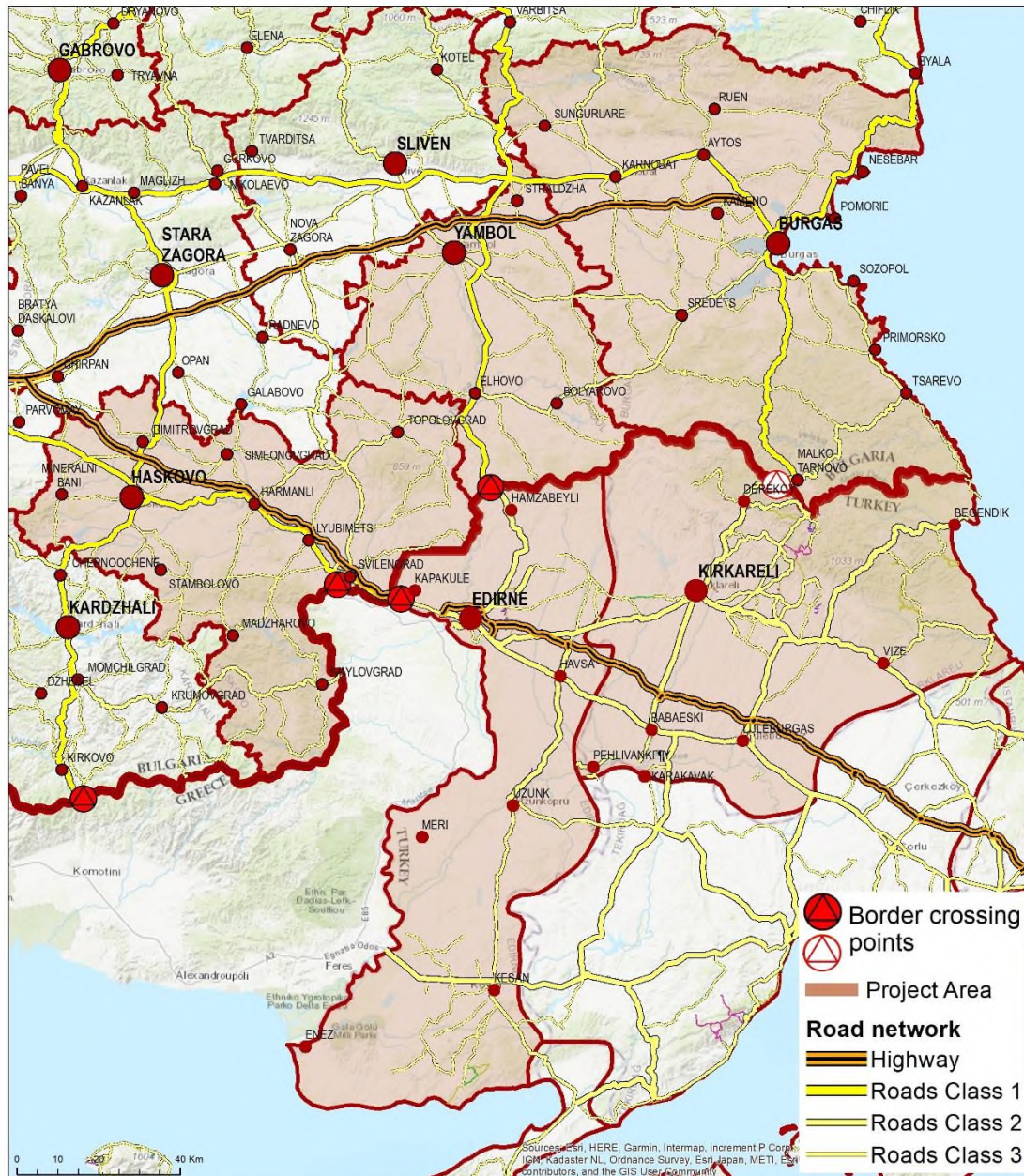
There are no airports in the Turkish part of the CBC region, the nearest airports are in Çorlu, Tekirdag Province and Istanbul.

⁵⁷<https://en.eurovelo.com/ev13>

Border crossing points

The three border crossing points in operation in the region are: Kapitan Andreevo- Kirkclar, Lesovo-Hamzabeyli and Malko Tarnovo- Dereköy (Map 12).

Map 12 : Bulgaria – Turkey border crossing point



The Kapitan Andreevo– Kapıkule border border crossing point is among the largest and busiest in the world in terms of the number of passengers and the amount of cargo passing through it. Most of the trade between Turkey, Iran and Syria and the countries of the European Union passes through this border crossing point. The Lesovo–Hamzabeyli border crossing point takes over part of the traffic from the main land connection between the two countries. The border crossing point Malko Tarnovo– Dereköy serves mainly tourist traffic.



Water transport

In the Bulgarian part of the cross-border area there are several ports of different size and purpose:

- Port of Burgas is a port for public transport of national importance. It is the only seaport in Bulgaria included in the main TEN-T network, has a connection with the “Trakia” motorway and the railway line 8, forming one of the destinations of the main TEN-T network. The port terminals Burgas-East and Burgas-East 2 are for general and bulk cargo, while the port terminal Burgas-West also handles containers. Rosenets is a terminal for oil and oil products, and the Nessebar terminal and the Burgas-East port terminal are for passenger services.
- The port of Nessebar is part of the port complex of Burgas and a year-round passenger port that serves international and coastal passenger transport.
- Port of Tsarevo is only for passenger services, accommodation and mooring of yachts, suitable for water sports and leisure activities;
- Ahtopol port is for passenger services, accommodation and mooring of fishing vessels;
- The Port of Pomorie offers passenger services, accommodation and mooring of fishing vessels and yachts, receiving and treatment of waste from shipping activities.

In Sozopol, Nessebar, Duni and Kiten there are several operating yachts and fishing ports.

In the Turkish part of the CBC area there are no ports of national and international importance. The ports of Kıyıköy in the Black Sea and Keşan Sazlıdere in the Aegean Sea are small, locally important, used mainly for fishing.

Telecommunications

Progress in the development of information services is considered basic to meet the needs of society and the economy. Information and communication technologies (ICTs) are gradually becoming widely available to the public, with access rates increasing significantly between 2007 and 2018. For ten years, the share of households with internet access in the EU28 has reached 85%, or 30 percentage points higher than 2007.

Bulgaria follows these rates with lower absolute values and in 2019 the internet access of households in the country increased to 75.1%, as for a ten-year period an increase of 42.0 percentage points was registered. To access the Internet, households use a mobile connection through the network of mobile telephone operators (64.0%) and a fixed cable connection – 57.8%.

Despite the positive trend in recent years, broadband coverage in Bulgaria is still below the EU28 average and household access in urban areas is much higher than in rural areas, especially in peripheral areas. According to NSI data, 74.9% of households in Bulgaria have broadband Internet access in 2019, respectively 79.6% for cities and 60% for villages.

The slower pace of development of Internet access in Bulgaria gives the advantage to be implemented better and currently the access provided in Bulgaria is almost 100% broadband.

Improving Internet access also increases its usage, which for Bulgaria increased from 51 to 67% for the period 2013-2019, but remains lower than in the EU countries, where over 80% of the



population regularly uses the Internet. Therefore, despite the higher rate of improving accessibility, catching up with European countries requires its acceleration.

In the CBC region, only Burgas region has access higher than the national average, but the usage is lower. Definitely the Yambol district lags behind (the lowest indicators in the country), where only half of the households have access to the Internet and not everyone uses it regularly.

Statistics for the territory of Turkey show that in the period 2013-2018 the relative share of households with Internet access in the country increased by 34.7 percentage points, and the percentage of households with broadband access increased by 36% (from 46.5% to 82.5%). Broadband coverage in Turkey is below the EU28 average, but slightly higher than in Bulgaria⁵⁸. According to the Turkish Statistical Institute (TurkStat), the number of broadband internet subscribers in 2018 in Edirne Province is 358 345 (87.1%), in Kırklareli Province it is 295 762 (82%) and in total for Turkey 74 500 089 (90.9%) (Table 35).

For the period 2013-2019, the relative share of households with Internet access is constantly increasing for all areas eligible for CBC. However, the level of households with internet access in the cross-border area is still lower than the national average.

Water supply and sewerage

Bulgaria and Turkey have a well-developed water supply system. At the end of 2018, the water supply systems provide water to 99.5% of the population of Bulgaria and 99% of the population of Turkey (2018). In the districts of Burgas and Yambol 100% of the population is connected to public water supply, while the district of Haskovo - 99.5%. There is a serious problem with the loss of water during the transfer to end users - 56.4% on average for Bulgaria in 2018, as for the district of Yambol the losses reach three quarters of the supplied water (Table 36).

For the Turkish part of the CBC region, the share of the municipal population served by the water supply network in the provinces of Edirne and Kırklareli is 98%. The share of the population served by a drinking water treatment plant by 2018 amounts to 68% in Edirne and 27% in Kırklareli.

Renewable energy sources

In line with the commitments made to implement the European Energy Strategy 2020, Bulgaria has already exceeded the national targets set for increasing the use of renewable energy sources (RES). The construction of various types of power plants from renewable sources went through its peak in the middle of the period 2007-2013, when the built capacity increased by almost 50%, and in the period 2013-2019 - a little over 2%, due to the later changed state policy in this regard.

Water, wind and solar energy are used in the country to produce alternative electricity depending on specific natural conditions. The renewable energy capacities in the country are based on hydropower, but in order to fulfil the set national goals for increasing the use of renewable energy sources, many solar energy capacities have been built in recent years. Data on the production of energy from renewable sources show that the favourable natural conditions in the CBC area are used rationally to absorb the potential of solar energy (Table 37).

Haskovo district is ranked fifth in the country in terms of renewable energy capacity due to the

⁵⁸Territorial analysis of the Bulgaria – Turkey cross-border area



one of the largest hydropower plants in the country - HPP "Ivaylovgrad", but in the CBC area many new solar power plants were installed. In order to track the contribution of the municipalities to the absorption of RES, a specific indicator, conditionally called "power density" - (MW/1000 km²) was sought. The municipality of Ivaylovgrad has a high indicator due to the large hydropower plant on the Ivaylovgrad dam, but the municipalities of Yambol district stand out, where there are the most photovoltaic power plants.

A quarter of the photovoltaic power plants in the country are built in the CBC area (21% of the total number and 26% of the total solar power capacity), due to the suitable natural conditions. The total RES capacity in the Bulgarian CBC area represents 10% of the capacity of renewable energy sources in the country, as the least developed are the capacities for production of biomass and wind energy, both in the region and in the country.

The power plants in the province of Edirne produce approximately 411 GW of electricity per year, entirely with renewable energy sources (Table 38). With an installed capacity of 167.20 MW for wind energy and 0.49 MW for solar in the entire province, an average of 393 GWh of electricity is generated annually. With an annual consumption of 1 350 GWh, Edirne produces 29% of its energy needs through renewable energy facilities, set up at the provincial borders. Four power plants with a total installed capacity of 16.41 MW are under construction, such as 14.41 MW of wind energy and 2.00 MW of solar energy.

Kirklareli Province has a total of 17 power plants with a total installed capacity of 1 765 MW and generating approximately 1 478 GW of electricity per year (Table 38). Kirklareli produces 8% of its energy from renewable energy sources and 92% from fossil fuels. The region of Kirklareli stands out with the tangible need for diversification of electricity sources through the construction and commissioning of power plants using renewable energy sources.

10. IDENTIFIED NEEDS AND DEVELOPMENT POTENTIALS

The Strategy for Integrated Territorial Development of the CBC area between Bulgaria and the Republic of Turkey will be based upon the identified needs and the potentials of the local resources, described below.

10.1. Identified needs

- Need for targeted interventions to increase the capacity of lower-level regional centres to keep people in the midst of free movement and to withstand competition from large cities;
- The continuing need to improve institutional and technical capacity to adequately respond to security and humanitarian challenges related to migrants;
- Balanced development of the business environment in the CBC area, by supporting the lagging behind regions;
- Promoting the development of the entrepreneurial ecosystem of the region and the entrepreneurship in general, as well as increasing of the attractiveness of the CBC area for foreign direct investment through appropriate interventions, as imperative long-term policies.



- Support/increase of the competence for participation of SMEs in European and national financing programmes and improvement of the qualification, related to research, planning and export of SMEs;
-
- Specific targeted support for the implementation of digital technologies in SMEs;
- Improving qualifications by acquiring key skills - leadership, management, marketing, digital and other competencies, as a key condition for increasing the competitiveness of SMEs;
- Need to increase resource and energy efficiency of SMEs;
- Urgent policies and measures to address the shortage of qualified staff, especially in the areas with higher unemployment;
- Support for implementing circular economy models in SMEs;
- Improving the culture of cooperation between SMEs, including for participation in programmes and solving common challenges and building a positive attitude towards various financing opportunities, instead of own funding as an important conditions for their successful development in a highly competitive environment;
- Ensuring investments in infrastructure for homogeneous distribution, including quality, according to regional needs, in the unsupported municipal road network with their important transport connections between small settlements and municipal and supra-municipal centres;
- Encouraging the emergence and development of new ideas for products and services offered by SMEs as imperative of their development;
- Provision of up-to-date information on markets, technologies, raw materials, innovations and financing programs for the needs of SMEs;
- Encouraging entrepreneurs in the SMEs to commit to improving the skills of their employees;
- Continuous technological renewal of SMEs, related to new knowledge and skills, machines and software products, required by the market;
- Policies and territorially oriented measures for tackling unemployment in the problem areas of the CBC region, encouraging economically inactive people in job search and training and stimulating the creation of new jobs;
-
- Improved access to health care for vulnerable groups in remote areas, and increase the health culture of the population, creating healthy habits and a positive attitude towards prevention;
- Reduction of seasonal air pollution with PM₁₀ by encouraging the abandonment of solid fuels for heating, modernizing road transport and improving the condition of adjacent infrastructure.
- Joint actions for reduction of transboundary pollution, such as water pollution, incl. seawater;
- Implementation of climate change mitigation and adaptation measures, a prerequisite for sustainable development in the CBC area;



- Continuation of the positive trends in the sector of waste collection, treatment and recycling, incl. expanding the circle of the population using such services and increasing the share of recycled waste;
- Increasing the efficiency and speed of border services, while maintaining and upgrading the level of security, incl. through the new technology implementation;
- Increasing the capacity and construction of wastewater treatment infrastructure as a basic requirement to combat pollution and mitigate the negative effects of climate change;
- Improvement and expansion of the existing network of bike lanes through field signalling, involvement of local communities in the initiative and promotion of the provided opportunities.

10.2. Development potential

- The Protocol implementing EU-Turkey Statement of 18 March 2016 provides a basis for concrete actions for operational cooperation in the fight against illegal migration;
- Potential for overcoming the seasonality and increasing the usability of the tourist superstructure, through the possibility to combine different leisure activities in time and space;
- Creating a regional tourist product for the CBC area, based on natural resources, cultural heritage, mineral springs and relatively good tourist infrastructure, and implementation of regional marketing and advertising;
- The realization of the potential of the CBC area, which is directly dependent on the compliance of the implemented tourism policy with the policy priorities in a wider European context, including increasing of competitiveness of the sector and promoting the development of sustainable, responsible and high-quality tourism;
- Continuation of the gradual and sustainable development of SMEs in the “Manufacturing” sector;
- The well-developed educational infrastructure in the CBC area has the potential to link vocational training and business needs in the long term;
- Use of the untapped potential for development of SMEs from the region in the tourism sector;
- Activation of the potential for development of the local handicrafts, through its adaptation to the modern markets;
- The significant contribution to the GDP of SMEs and the large number of employees in them determine the serious potential of the measures, related to the development of SMEs with their wide positive effect on the economy as a whole;
- The development of SMEs in the field of ICT provides an opportunity to create products with high added value;
- The significant number of SMEs and the variety of areas in which they operate, has the potential to increase the competitiveness of SMEs through their participation in joint initiatives, programmes and projects;



- Development of the potential for export of goods and services by maintaining their competitiveness on the international market by orienting part of the investments towards green transition;
- Identification of Bulgaria as a major foreign trade partner of the Province of Edirne creates potential for joint action in cross-border cooperation related to exports and imports, respectively;
- Development of the potential of the rich natural heritage of the region to contribute to balanced sustainable development through the implementation of nature protection policies, taking into account the ecological, scientific, cultural, economic, social and recreational requirements, as well as regional and local peculiarities;
- Using the potential of the Orient/Eastern-Mediterranean corridor as a basis for creating the necessary communication and transport conditions for sustainable development and improved mobility;
 - The Lesovo–Hamzabeyli border checkpoint has the potential to unload traffic through the Kapitan Andreevo- Kapıkule border checkpoint, while developing the related infrastructure.
- The development of cycling routes in the region has the potential to create conditions for rediscovering and developing unpopular destinations and supporting local communities.



11. CONCLUSIONS

The analysis of the existing situation outlines a picture dotted with opportunities, needs and potentials for development. Along with the encouraging results, there are difficulties and sometimes lasting negative trends, leading to an imbalance in the development of the territory in both sectoral and territorial aspects.

The accumulation of problems in various areas, especially in remote and depopulated areas, generates a negative cumulative effect, which is crucial for the deepening of more acute problems and has an overall negative impact in all areas of development.

This makes the use of a balanced and territorial needs-oriented integrated approach key to achieving sustainable results.

The dominant position of SMEs in the economic realities of the CBC region largely determines their potential to be a major driving force in the economic recovery after the Covid-19 pandemic and its subsequent long-term development.

It seems absolutely necessary, given the central role of SMEs, to develop a package of mutually influential measures in different areas. In order to be able to achieve an overall cumulative effect, it is necessary to ensure the implementation of the necessary minimum of territorially focused interventions in the various areas.

Their integrated response will be able, through its long-term action, to reverse the trends, leading the territory to socio-economic stability and sustainable development.