



# MARITIME SPATIAL PLAN OF THE REPUBLIC OF BULGARIA 2021-2035

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## LIST OF ABBREVIATIONS

|              |   |
|--------------|---|
| <b>BSCDA</b> | Black Sea Coast Development Act             |
| <b>CM</b>    | Council of Ministers                        |
| <b>EMCC</b>  | Emergency medical care centres              |
| <b>EU</b>    | European Union                              |
| <b>NCTD</b>  | National Centre for Territorial Development |
| <b>NER</b>   | North-eastern Region                        |
| <b>NSI</b>   | National Statistical Institute              |
| <b>SER</b>   | South-eastern Region                        |
| <b>SG</b>    | State Gazette                               |

## URBANISATION OF THE BULGARIAN BLACK SEA COAST

### 1. Territorial scope

The territorial scope of the Maritime Spatial Plan of the Republic of Bulgaria which is subject of detailed study is identified in its adjacent coastal zone by fourteen municipalities, which border in the east on the Black Sea and form part of three districts (Dobrich, Burgas and Varna) (N-S). These are the municipalities of Shabla, Kavarna, Balchik, Aksakovo, Varna, Avren, Dolni Chiflik, Byala, Nessebar, Pomorie, Burgas, Sozopol, Primorsko and Tsarevo. Their combined territory has an area of 5 737.3 km<sup>2</sup>, or 5.2 % of the territory of Bulgaria. The zone includes 202 settlements with a combined population of 726 745 inhabitants, or 10.4 % of Bulgaria's population. The centre in the northern part—the city of Varna—is the third largest in terms of population numbers, and the centre in the northern part—the city of Burgas—is the fourth largest in terms of population numbers among the cities in the country.

Together with its land-use area of 253.644 km<sup>2</sup>, the city of Burgas is the second largest in terms of area in Bulgaria (second to Sofia). Over the last 35 years, a number of adjacent villages were merged into it. Four villages were merged into it in 1987—Gorno Ezerovo, Lozovo, Kraymorie and Sarafovo. The village of Dolno Ezerovo was merged in 1991. The Decision of the Municipal Council of Burgas for merger of the municipal villages of Banevo and Vetren (formerly known as Zhitarovo) as residential areas of the city was approved by Decision of the Council of Ministers in 2009. In 2015 the villages of Rudnik and Chernomore were designated as residential areas of the city of Burgas.

Table 1: Area, population density and settlements as of 31.12.2018

| Municipalities   | Area – km <sup>2</sup> | Population – numbers | Population density per 1 km <sup>2</sup> | No. of settlements | No. of towns | No. of villages |
|------------------|------------------------|----------------------|--|--------------------|--------------|-----------------|
| <b>Black Sea</b> | <b>5 737.3</b>         | <b>726 745</b>       | <b>126.7</b>                             | <b>202</b>         | <b>22</b>    | <b>180</b>      |
| Shabla           | 328.7                  | 4 367                | 13.3                                     | 16                 | 1            | 15              |
| Kavarna          | 481.0                  | 14 020               | 29.1                                     | 21                 | 1            | 20              |
| Balchik          | 521.9                  | 19 331               | 37.0                                     | 22                 | 1            | 21              |
| Aksakovo         | 461.3                  | 20 557               | 44.6                                     | 23                 | 2            | 21              |
| Varna            | 237.7                  | 345 369              | 1 453.1                                  | 6                  | 1            | 5               |
| Avren            | 356.4                  | 9 152                | 25.7                                     | 17                 | -            | 17              |
| Dolni Chiflik    | 485.8                  | 18 492               | 38.1                                     | 17                 | 1            | 16              |
| Byala            | 162.1                  | 3 287                | 20.3                                     | 6                  | 1            | 5               |
| Nessebar         | 418.9                  | 27 879               | 66.6                                     | 14                 | 3            | 11              |
| Pomorie          | 407.8                  | 27 233               | 66.8                                     | 17                 | 3            | 14              |
| Burgas           | 531.8                  | 208 915              | 392.9                                    | 12                 | 2            | 10              |
| Sozopol          | 477.1                  | 13 005               | 27.3                                     | 12                 | 2            | 10              |
| Primorsko        | 355.4                  | 6 124                | 17.2                                     | 6                  | 2            | 4               |
| Tsarevo          | 511.5                  | 9 014                | 17.6                                     | 13                 | 2            | 11              |

Source: NSI, data processing NCTD

## 2. Demographics

### 2.1. Numbers and age structure of the population

As of 31 December 2018, the population of the Black Sea municipalities stood at 726 745 people and constituted 10.4 % of the population of Bulgaria. Compared to the end of 2011, the population of the Black Sea municipalities increased by 264 people, or by 0.04 %. Over the same period the population of the country declined by 4.5 %. Over a period of seven years the population numbers increased in 7 municipalities, the more significant growth taking place in the municipalities of Nessebar (by 4 734 people), Varna (by 1 726 people) and Avren (by 520 people). Steep rates of population loss were observed in the municipalities of Shabla and Kavarna, while in the municipality of Pomorie the rate was minus 1.1 % (Table 2). The table below illustrates the population dynamics by municipalities.

Table 2: Population of Black Sea municipalities in 2011 and 2018

| Municipalities               | Population based on current statistics as of 31 December |                  |                  |             |
|------------------------------|--|------------------|------------------|-------------|
|                              | 2011   | 2018             | Growth 2018/2011 |             |
|                              | number   | number           | number           | %           |
| <b>Total for the country</b> | <b>7 327 224</b>   | <b>7 000 039</b> | <b>-327 185</b>  | <b>-4.5</b> |
| <b>Black Sea</b>             | <b>726 481</b>   | <b>726 745</b>   | <b>264</b>       | <b>0.04</b> |
| Shabla                       | 4 995  | 4 367            | -628             | -12.6       |
| Kavarna                      | 15 216   | 14 020           | -1 196           | -7.9        |
| Balchik                      | 20 232   | 19 331           | -901             | -4.5        |
| Aksakovo                     | 20 484   | 20 557           | 73               | 0.4         |
| Varna                        | 343 643  | 345 369          | 1 726            | 0.5         |
| Avren                        | 8 632  | 9 152            | 520              | 6.0         |
| Dolni Chiflik                | 19 292   | 18 492           | -800             | -4.1        |
| Byala                        | 3 230  | 3 287            | 57               | 1.8         |
| Nessebar                     | 23 145   | 27 879           | 4 734            | 20.5        |
| Pomorie                      | 27 530   | 27 233           | -297             | -1.1        |
| Burgas                       | 212 032  | 208 915          | -3 117           | -1.5        |
| Sozopol                      | 12 657   | 13 005           | 348              | 2.7         |
| Primorsko                    | 6 082  | 6 124            | 42               | 0.7         |
| Tsarevo                      | 9 311  | 9 014            | -297             | -3.2        |

Source: NSI, data processing NCTD

The process of ageing of the population in the municipalities under review, which is also typical of the other Bulgarian municipalities, is continuing but in Black Sea municipalities its values are more favourable than the national averages. At the end of 2018, persons aged 65 and over numbered 136 913, or 18.8 % of the municipalities' population, while the national average was 21.3 %. The share of the population in this age group has increased by 2.6 percentage

points compared to 2011. For EU-28, the relative share of the population aged 65 and over is 19.7 %.

As far as municipalities are concerned, the share of persons aged 65 and over is highest in the municipalities of Shabla (30.8 %), Avren (26.5 %), Byala (24.6 %) and Sozopol (24.4 %). In 6 municipalities this share is more favourable than the national average, including in both major municipalities — Varna (17.9 %) and Burgas (18.5 %). The age structure of the population in only one municipality<sup>1</sup> is gravely distorted and is incapable of ensuring reproduction of either the population in general or of the labour potential.

As of 31.12.2018, there were **110 522 children aged below 15 years, or 15.2 % of the total number of the population**, while nationwide this share was 14.4 %, meaning that the share in Black Sea municipalities was more favourable by 0.8 percentage points.

The relative share of the population under 15 years of age in the municipality’s population was highest in the municipalities of Dolni Chiflik (17.9 %), Aksakovo (15.7 %), Burgas (15.6 %) and Varna (15.1 %). In a total of 8 municipalities this share was below the national average; it was lowest in the municipalities of Shabla (10.7 %), Primorsko (12.1 %) and Sozopol (12.2 %).

As of 31.12.2018, the population in the age group between 15 and 64 years in the component municipalities was 479 310 people **or 66.0 % of the total population**, while nationwide this share was 64.4 %, meaning that the share of Black Sea municipalities was more favourable by 1.6 percentage points.

The relative share of the population in this age group in the municipality’s population is highest in the municipalities of Varna (66.9 %), Burgas (65.9 %), Pomorie (65.3 %) and Primorsko (65.2 %). In 6 municipalities this share is below the national average and it is lowest in the municipalities of Shabla (58.5 %), Avren (60.0 %) and Byala (62.1 %).

Table 3: Population numbers as of 31.12.2018 in Black Sea municipalities by main age groups

| Municipalities   | Total            | 0—14             | 15—64            | 65+              | 0—14               | 15—64       | 65+         |
|------------------|------------------|------------------|------------------|------------------|--------------------|-------------|-------------|
|                  | number           |                  |                  |                  | relative share - % |             |             |
| <b>Bulgaria</b>  | <b>7 000 039</b> | <b>1 004 845</b> | <b>4 502 075</b> | <b>1 493 119</b> | <b>14.4</b>        | <b>64.3</b> | <b>21.3</b> |
| <b>Black Sea</b> | <b>726 745</b>   | <b>110 522</b>   | <b>479 310</b>   | <b>136 913</b>   | <b>15.2</b>        | <b>66.0</b> | <b>18.8</b> |
| Shabla           | 4 367            | 468              | 2 554            | 1 345            | 10.7               | 58.5        | 30.8        |
| Kavarna          | 14 020           | 1 964            | 8 903            | 3 153            | 14.0               | 63.5        | 22.5        |
| Balchik          | 19 331           | 2 674            | 12 520           | 4 137            | 13.8               | 64.8        | 21.4        |
| Aksakovo         | 20 557           | 3 225            | 13 114           | 4 218            | 15.7               | 63.8        | 20.5        |
| Varna            | 345 369          | 52 686           | 231 024          | 61 659           | 15.3               | 66.9        | 17.9        |
| Avren            | 9 152            | 1 236            | 5 492            | 2 424            | 13.5               | 60.0        | 26.5        |
| Dolni Chiflik    | 18 492           | 3 304            | 12 028           | 3 160            | 17.9               | 65.0        | 17.1        |
| Byala            | 3 287            | 466              | 2 013            | 808              | 14.2               | 61.2        | 24.6        |
| Nessebar         | 27 879           | 4 203            | 18 267           | 5 409            | 15.1               | 65.5        | 19.4        |

<sup>1</sup> The share of the population aged 65+ is over 30 %.

| Municipalities | Total   | 0—14   | 15—64   | 65+                | 0—14 | 15—64 | 65+  |
|----------------|---------|--------|---------|--------------------|------|-------|------|
|                | number  |        |         | relative share - % |      |       |      |
| Pomorie        | 27 233  | 4 037  | 17 790  | 5 406              | 14.8 | 65.3  | 19.9 |
| Burgas         | 208 915 | 32 539 | 137 687 | 38 689             | 15.6 | 65.9  | 18.5 |
| Sozopol        | 13 005  | 1 717  | 8 121   | 3 167              | 13.2 | 62.4  | 24.4 |
| Primorsko      | 6 124   | 739    | 3 995   | 1 390              | 12.1 | 65.2  | 22.7 |
| Tsarevo        | 9 014   | 1 264  | 5 802   | 1 948              | 14.0 | 64.4  | 21.6 |

Source: NSI, data processing NCTD

## 2.2. Territorial distribution of the population

The territorial distribution of the population is determined by **the natural population change (number of births and deaths), as well as by internal and external migration**. The changes in the administrative and territorial division of Bulgaria (such as merger of settlements, transfer of settlements from one municipality to another) also have a purely statistical impact on the territorial distribution of the population.

As of 31.12.2018, 640 803 people, or 88.2 % of the population of Black Sea municipalities, lived in towns and cities and 85 942 people, or 11.8 % of the population, lived in villages.

The distribution of the population shows a clear differentiation from the coastal area towards the hinterland. 85.7 % of the population of Black Sea municipalities is concentrated in 31 settlements along the coastline. The relative share of the urban population is 98.7 % with an upward trend, in parallel with the growth of the population of the coastal zone. There is a concentration of economic and administrative potential in this zone.

At the end of 2018, there were 202 settlements in Black Sea municipalities, of which 22 towns and cities and 180 villages.

Only the village of Bryastovo, Balchik municipality, is depopulated. The total number of villages with up to 10 inhabitants is 7, while the population of 17 settlements is between 11 and 50 inhabitants, meaning that the population of 4.0 % of settlements is between 1 and 50 inhabitants.

Four towns in Black Sea municipalities have populations of more than 10 000 inhabitants and 6.7 % of the population of Black Sea municipalities lives in them. 74.2 % of the population of Black Sea municipalities live in the cities of Burgas and Varna, each having a population of more than 100 000 inhabitants.

The most numerous group is that of settlements with populations between 101 and 500 inhabitants — 39.1 %, and 2.8 % of the population of Black Sea municipalities lives in such settlements.



Table 4: Settlements in Black Sea municipalities, based on population numbers, as of 31.12.2018

| Settlement size according to the population numbers | Settlements |            | Population     |            |
|---|-------------|------------|----------------|------------|
|   | Number      | %          | Number         | %          |
| <b>Total</b>  | <b>202</b>  | <b>100</b> | <b>726 745</b> | <b>100</b> |
| Depopulated   | 1           | 0.5        | 0              | 0.0        |
| 1—10  | 7           | 3.5        | 40             | 0.0        |
| 11—50   | 17          | 8.4        | 578            | 0.1        |
| 51—100  | 22          | 10.9       | 1 592          | 0.2        |
| 101—500   | 79          | 39.1       | 20 100         | 2.8        |
| 501—1 000   | 27          | 13.4       | 20 641         | 2.8        |
| 1 001—10 000  | 43          | 21.3       | 96 299         | 13.3       |
| 10 001—50 000                                       | 4           | 2.0        | 48 556         | 6.7        |
| 50 001—100 000                                      | 0           | 0.0        | 0              | 0.0        |
| 100 000 plus  | 2           | 1.0        | 538 939        | 74.2       |

Source: NSI, data processing NCTD

### Black Sea municipalities

As of 31.12.2018 the Black Sea municipalities are 14 in number. Based on population numbers they are distributed as follows:

Table 5: Sizes of Black Sea municipalities, based on population numbers, as of 31.12.2018

| Municipality size | Municipalities |            | Population     |            |
|-------------------|----------------|------------|----------------|------------|
|                   | number         | %          | number         | %          |
| <b>Total</b>      | <b>14</b>      | <b>100</b> | <b>726 745</b> | <b>100</b> |
| up to 5 999       | 2              | 14.3       | 7 654          | 1.1        |
| 6 000—19 999      | 7              | 50.0       | 89 138         | 12.3       |
| 20 000—49 999     | 3              | 21.4       | 75 669         | 10.4       |
| 50 000—100 000    | 0              | 0.0        | 0              | 0.0        |
| 100 001 plus      | 2              | 14.3       | 554 284        | 76.3       |

Source: NSI, data processing NCTD

The average number of inhabitants calculated per municipality as of 31.12.2018 stood at 51 910 people.

The distribution of population by municipalities is also uneven. As little as 1.1 % of the population of municipalities live in 2 municipalities with a population of less than 6 000 people<sup>2</sup>. The critically low population number of one municipality places in doubt its autonomous existence. At the same time, 76.3 % of the population of municipalities live in 2 municipalities with populations of more than 100 000 people. In terms of population numbers, the biggest municipality

<sup>2</sup> Article 8(1) of the Territorial Administration of the Republic of Bulgaria Act (published in SG No 63/1995, last amended in SG No 58/2017) sets out the existence of population of more than 6 000 people as the main requirement for creating a new municipality.

is Varna (345 369), followed by Burgas (208 915). The smallest municipality is Byala (3 282 inhabitants), followed by the municipality of Shabla (4 367 inhabitants).

### **Towns and cities**

The Black Sea has played the role of town-forming factor from the earliest historical epochs, when the first Thracian settlements were founded along the seashores.

As early as the second half of the 7<sup>th</sup> century B.C., the first Greek colonies were founded along the western Black Sea shores. The Greek colonists were attracted by the abundance of raw materials in the Thracian lands. This was the reason why initially trading centres sprang up, which subsequently developed into Greek-style towns (polises). The first towns built in the Bulgarian section of the Black Sea coast in the place of ancient Thracian settlements or near them are Dionysopolis (Balchik), Odessos (Varna), Mesemvria (Nessebar), Anchialo (Pomorie) and Apollonia (Sozopol). The presence of the sea as a convenient defence and trading route stimulated their development as strategic trading posts.

The establishment of the First Bulgarian Empire also played a major role for the changes in relations among settlements. The most numerous monuments representing the periods of the First and Second Bulgarian Kingdom are to be found in Nessebar. These are mainly buildings of worship.

Under the blows of invaders from Turkey, the economic and cultural development of Bulgarian cities suffered a decline. After the liberation from Ottoman rule, due to the emigration of a part of the Turkish population and the Tatars, the population numbers at the Black Sea coast declined. This brought a new content to many settlements, which were populated and rebuilt by the newly-settled Bulgarian population of Strandzha, Thrace and Macedonia. The mass settlement of refugee populations following World War I in Bulgaria contributed to the building of new residential areas in existing towns. New villages sprang up in the area until 1926, characterised by uniform development.

At the end of 2018, there were 22 towns and cities in Black Sea municipalities and 640 803 people lived there, compared to 634 984 people at the end of 2011, meaning that in 7 years the population increased by 5 919 people (0.9 %). Over the same period the populations of towns and cities in Bulgaria declined by 3.9 %, meaning that Black Sea towns and cities are in a better situation than most towns and cities in the country.

In the 2011—2018 period the population of 9 towns and cities increased: of Burgas — by 2 950 people (or by 0.5 ‰), of Nessebar — by 2 552 people (or by 24.2 %), of Varna — by 1 724 people (or by 0.5 %), of Sveti Vlas — by 865 people (or by 29.8 %), of Obzor — by 212 people (or by 9.8 %), of Pomorie — by 130 people (or by 1.0 %), of Byala — by 76 people (or by 3.8 %), of Sozopol — by 57 people (or by 1.3 %), and of Chernomorets — by 32 people (or by 1.6 %).

## VOLUME 5. URBANISATION OF THE BULGARIAN BLACK SEA COAST

In 2015 the following mayoralties were abolished: the village of Rudnik and the village of Chernomorets<sup>3</sup>, and they were designated as residential areas of the city of Burgas.

A greater decline of the population over the same period was observed in the towns of Kavarna — by 714 people (-6.2 %) and Balchik — by 542 people (-4.7 %).

Table 6: Population of Black Sea towns and cities in 2011 and 2018

| Towns and cities             | Population based on current statistics as of<br>31 December |                  |                  |             |
|------------------------------|---|------------------|------------------|-------------|
|                              | 2011  | 2018             | Growth 2018/2011 |             |
|                              | number  | number           | number           | %           |
| <b>Total for the country</b> | <b>5 324 900</b>  | <b>5 159 129</b> | <b>-165 771</b>  | <b>-3.1</b> |
| <b>Black Sea</b>             | <b>634 984</b>  | <b>640 803</b>   | <b>5 819</b>     | <b>0.9</b>  |
| Shabla                       | 3 390   | 3 079            | -311             | -9.2        |
| Kavarna                      | 11 481  | 10 767           | -714             | -6.2        |
| Balchik                      | 11 593  | 11 051           | -542             | -4.7        |
| Aksakovo                     | 7 839   | 7 726            | -113             | -1.4        |
| Ignatievo <sup>1</sup>       | 4 006   | 3 955            | -51              | -1.3        |
| Varna                        | 334 781   | 336 505          | 1 724            | 0.5         |
| Dolni Chiflik                | 6 638   | 6 378            | -260             | -3.9        |
| Byala                        | 2 011   | 2 087            | 76               | 3.8         |
| Obzor                        | 2 155   | 2 367            | 212              | 9.8         |
| Sveti Vlas                   | 2 902   | 3 767            | 865              | 29.8        |
| Nessebar                     | 10 531  | 13 083           | 2 552            | 24.2        |
| Aheloy                       | 2 426   | 2 262            | -164             | -6.8        |
| Kableshkovo                  | 2 895   | 2 857            | -38              | -1.3        |
| Pomorie                      | 13 525  | 13 655           | 130              | 1.0         |
| Burgas                       | 199 484   | 202 434          | 2 950            | 1.5         |
| Balgarovo                    | 1 681   | 1 528            | -153             | -9.1        |
| Chernomorets                 | 2 062   | 2 094            | 32               | 1.6         |
| Sozopol                      | 4 285   | 4 342            | 57               | 1.3         |
| Primorsko                    | 2 989   | 2 924            | -65              | -2.2        |
| Kiten                        | 950   | 932              | -18              | -1.9        |
| Tsarevo                      | 6 065   | 5 772            | -293             | -4.8        |
| Ahtopol                      | 1 295   | 1 238            | -57              | -4.4        |

Source: NSI, data processing NCTD

According to their existing population numbers, the towns and cities are grouped in the following categories<sup>4</sup>:

<sup>3</sup> SG No 66/2015

<sup>4</sup> According to Regulation No 7 laying down rules and norms for the planning of individual types of territories and development zones.

Table 7: Towns and cities in Black Sea municipalities, based on their population numbers, as of 31.12.2018

| Town or city size                                       | Towns and cities |              | Population     |              |
|---|------------------|--------------|----------------|--------------|
|   | number           | %            | number         | %            |
| <b>Total</b>  | <b>22</b>        | <b>100.0</b> | <b>640 803</b> | <b>100.0</b> |
| Very large, of more than 200 000 inhabitants            | 2                | 9.1          | 538 939        | 84.1         |
| Large, of between 100 000 and 200 000 inhabitants       | 0                | 0.0          | 0              | 0.0          |
| Medium-sized, of between 30 000 and 100 000 inhabitants | 0                | 0.0          | 0              | 0.0          |
| Small, of between 10 000 and 30 000 inhabitants         | 4                | 18.2         | 48 556         | 7.6          |
| Very small, of up to 10 000 inhabitants                 | 16               | 72.7         | 53 308         | 8.3          |

Source: NSI, data processing NCTD

The category of “very small towns”—of up to 10 000 inhabitants—is in first place in the region under review. They account for 72.7 % of the total number of towns and cities and nearly 8.3 % of the population live there. These are the towns of Shabla, Aksakovo, Ignatievo, Dolni Chiflik, Byala, Obzor, Sveti Vlas, Aheloy, Kableshekovo, Balgarovo, Chernomorets, Sozopol, Primorsko, Kiten, Tsarevo and Ahtopol, only two of which are located away from the shoreline.

The category of “small towns” comprises the towns of Kavarna, Balchik, Nessebar and Pomorie. They account for 18.6 % of the number of settlements and 7.6 % of the population live there.

The category of “very large cities” comprises the cities of Varna and Burgas and 84.1 % of the population live there. Varna is the biggest city on the Black Sea coast, an important centre in the polycentric urban model of the country which balances the influence of the capital city and is of importance for the development of North-eastern Bulgaria. Its development is characterised by good values of all indicators, including in terms of demographic dynamics and positive growth for the 2011—2018 period.

Burgas, just as Varna, is also a gateway on the Black Sea, an external EU border and eastern terminus of the main urbanisation axis Sofia–Plovdiv–Stara Zagora–Burgas. It is an important centre in the polycentric urban model of the country which balances the influence of Sofia in South-eastern Bulgaria. Along with Varna, this is the pair of major economic, transportation, administrative, educational, health, cultural and tourist centres which offer a unique sense of place and a superior quality of living. Burgas registers favourable trends in its demographic indicators and a positive population growth in the 2011—2018 period. Varna and Burgas are centres of agglomeration areas and intermodal hubs with development potential for the future.

## Villages

At the end of 2018, there were 180 villages in Black Sea municipalities and 85 942 people lived there, compared to 85 648 people<sup>5</sup> at the end of 2011, meaning that in 7 years the population increased by 293 people (0.3 %). Over the same period the populations of villages in the country declined by 7.9 %, meaning that Black Sea municipalities are in a better situation than most other villages in the country.

In the 2011—2018 period the population in 67 villages increased (the increase, presented in Table 8, was more significant), in 3 villages it remained unchanged and in 110 villages the population declined.

Table 8: Population of villages in Black Sea municipalities in 2011 and 2018

| Villages                   | Population based on current statistics as of<br>31 December |                  |                  |             |
|----------------------------|---|------------------|------------------|-------------|
|                            | 2011  | 2018             | Growth 2018/2011 |             |
|                            | number  | number           | number           | %           |
| <b>Bulgaria — villages</b> | <b>1 996 475</b>  | <b>1 840 910</b> | <b>-155 565</b>  | <b>-7.8</b> |
| <b>Black Sea</b>           | <b>85 648</b>   | <b>85 942</b>    | <b>294</b>       | <b>0.3</b>  |
| village of Ravda           | 2 161   | 2 849            | 688              | 31.8        |
| village of Bliznatsi       | 784   | 1 000            | 216              | 27.6        |
| village of Kamenar         | 2 608   | 2 806            | 198              | 7.6         |
| village of Tankovo         | 1 164   | 1 359            | 195              | 16.8        |
| village of Kosharitsa      | 1 227   | 1 404            | 177              | 14.4        |
| village of Slanchevo       | 771   | 939              | 168              | 21.8        |
| village of Benkovski       | 529   | 685              | 156              | 29.5        |
| village of Izvorsko        | 782   | 935              | 153              | 19.6        |

Source: NSI, data processing NCTD

According to the existing population numbers, villages are grouped in the following categories<sup>6</sup>:

Table 9: Villages in Black Sea municipalities, based on their population numbers, as of 31.12.2018

| Size of villages                                     | Villages   |              | Population    |              |
|--|------------|--------------|---------------|--------------|
|  | Number     | %            | Number        | %            |
| <b>Total</b>   | <b>180</b> | <b>100.0</b> | <b>85 942</b> | <b>100.0</b> |
| Very large, of more than 5 000 inhabitants           | 0          | 0.0          | 0             | 0.0          |
| Large, of between 2 000 and 5 000 inhabitants        | 6          | 3.3          | 15 776        | 18.4         |
| Medium-sized, of between 1 000 and 2 000 inhabitants | 23         | 12.8         | 29 147        | 33.9         |
| Small, of between 250 and 1 000 inhabitants          | 60         | 33.3         | 31 239        | 36.3         |
| Very small, of up to 250 inhabitants                 | 91         | 50.6         | 9 780         | 11.4         |

Source: NSI, data processing NCTD

<sup>5</sup> Excluding the villages of Rudnik and Chernomore

<sup>6</sup> According to Regulation No 7 laying down rules and norms for the planning of individual types of territories and development zones.

From the table above it is evident that the “very small villages” of up to 250 inhabitants occupy the first place in the category under review. They represent 50.6 % of the total number of villages, and 11.4 % of the rural population live there.

Second comes the category of “small villages” of between 250 and 1 000 inhabitants. They represent 33.3 % of the total number of villages, and 36.3 % of the rural population live there.

The group of “medium-sized villages” of between 1 000 and 2 000 inhabitants comes third. They represent 12.8 % of the total number of villages, and 33.9 % of the rural population live there.

The group of “large villages” of between 2 000 and 5 000 inhabitants is in the fourth place. They hold a share of 3.3 % of the total number and 18.4 % of the population. The largest one is the village of Topoli (3 072 inhabitants) in the municipality of Varna, the other large villages are Ravda (2 849 inhabitants), Kamemar (2 806 inhabitants), Staro Oryahovo (2 579 inhabitants), Grozdyovo (2 371 inhabitants) and Obrochishte (2 099 inhabitants).

### **2.3. Natural and mechanical population change**

The number and structure of the population are determined by the magnitude and intensity of its natural and mechanical (migration) change.

#### **Natural population change**

The natural population change is the difference between the number of live births and the number of deaths. In 2018, as a result of the negative natural population change, the population of the Black Sea municipalities under review decreased by 2 556 people.

The population decrease, measured by the rate of *natural population change*<sup>7</sup>, was *minus 3.5 ‰ in 2018 and minus 0.9 ‰ in 2011*. The rate of natural population change in the country as a whole in 2018 was minus 6.6 ‰ and in 2011 it was minus 5.1 ‰.

The rate of natural population change for EU-28 was minus 0.4 ‰.

In 2011, 2 municipalities saw a positive natural population change and in 2018 the natural population change in all municipalities was negative.

Significant differences are observed among municipalities in terms of rates of natural population change. In 2018, the lowest values of the rate of negative natural population change were registered in the municipalities of Nessebar (-0.0 ‰), Varna (-2.1 ‰) and Burgas (-3.1 ‰). In 3 municipalities the rate of natural population change was 2 or more times less favourable than the national average — in Shabla (-21.7 ‰), Avren (-13.0 ‰) and Byala (-12.5 ‰).

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<sup>7</sup> Difference between the number of live births and the number of deaths per 1 000 people of the average annual population number.

Table 10: Rates of natural population change in Black Sea municipalities between 2011 and 2018, in per mille

| Municipalities               | 2011        | 2016        | 2017        | 2018        |
|------------------------------|-------------|-------------|-------------|-------------|
|                              | ‰           | ‰           | ‰           | ‰           |
| <b>Total for the country</b> | <b>-5.1</b> | <b>-6.0</b> | <b>-6.5</b> | <b>-6.6</b> |
| <b>Black Sea</b>             | <b>-0.9</b> | <b>-2.8</b> | <b>-3.2</b> | <b>-3.5</b> |
| Shabla                       | -15.3       | -12.1       | -19.8       | -21.7       |
| Kavarna                      | -5.8        | -6.8        | -9.0        | -8.6        |
| Balchik                      | -3.9        | -8.3        | -7.5        | -9.8        |
| Aksakovo                     | -6.6        | -6.1        | -10.0       | -6.5        |
| Varna                        | 1.2         | -1.4        | -1.3        | -2.1        |
| Avren                        | -12.0       | -10.7       | -13.3       | -13.0       |
| Dolni Chiflik                | -2.2        | -5.1        | -4.6        | -5.0        |
| Byala                        | -7.4        | -16.9       | -14.6       | -12.5       |
| Nessebar                     | 0.3         | -0.7        | -2.6        | 0.0         |
| Pomorie                      | -2.7        | -4.8        | -5.6        | -5.7        |
| Burgas                       | -1.4        | -2.6        | -2.9        | -3.1        |
| Sozopol                      | -6.7        | -7.0        | -7.6        | -7.7        |
| Primorsko                    | -6.9        | -9.4        | -8.9        | -6.5        |
| Tsarevo                      | -3.5        | -5.2        | -6.8        | -8.7        |

Source: NSI, data processing NCTD

### Mechanical population change

The mechanical population change (the net external emigration balance) also influences significantly the number and structures of the population in the region. It is the difference between the people who settled in the municipalities and the people who left the municipalities. The rate of mechanical population change in the municipalities examined was 0.8 ‰ in 2011 and 2.8 ‰ in 2018, while for the country as a whole it was -0.8 ‰ in 2011 and -0.5 ‰ in 2018. In other words, mechanical population change in the municipalities has more favourable indicators than the national averages.

In 2018, two districts had a positive mechanical population change: Varna — by 1 058 people (or by 2.2 ‰) and Shumen — by 706 people (or by 4.1 ‰). The greatest population decrease as a result of the negative mechanical population change was observed in Dobrich district — by 699 people (or by -4.0 ‰), while in Targovishte district the decrease was purely symbolic — by 1 person (or 0.0 ‰).

In 2018, 7 municipalities experienced a positive mechanical population change, the more significant increases occurring in the municipalities of Varna — by 1 355 people (or by 3.9 ‰), Nessebar — by 408 people (or by 17.7 ‰), and Burgas — by 363 people (or by 1.7 ‰). The largest population decrease as a result of the negative mechanical population change was registered in the municipalities of Balchik — by 125 people (or by - 6.4 ‰), Dolni Chiflik — by 113 people (or by - 6.1 ‰), and Tsarevo — by 99 people (or by -10.9 ‰).



Table 11: Rates of mechanical population change in Black Sea municipalities between 2011 and 2018, in per mille

| Municipalities   | 2011        | 2016        | 2017        | 2018        |
|------------------|-------------|-------------|-------------|-------------|
|                  | ‰           | ‰           | ‰           | ‰           |
| <b>Bulgaria</b>  | <b>-0.7</b> | <b>-1.3</b> | <b>-0.8</b> | <b>-0.5</b> |
| <b>Black Sea</b> | <b>0.8</b>  | <b>2.6</b>  | <b>2.5</b>  | <b>2.8</b>  |
| Shabla           | -0.4        | -3.9        | -10.1       | -2.5        |
| Kavarna          | -4.8        | -5.7        | -4.0        | -4.7        |
| Balchik          | -2.0        | -3.4        | -4.0        | -6.4        |
| Aksakovo         | 9.3         | 9.3         | -1.7        | -1.5        |
| Varna            | -0.2        | 3.4         | 3.5         | 3.9         |
| Avren            | 17.3        | -0.8        | -9.5        | -6.4        |
| Dolni Chiflik    | -2.4        | -3.0        | 1.2         | -6.1        |
| Byala            | 7.1         | 12.7        | 5.8         | 13.7        |
| Nessebar         | 36.4        | 13.8        | 7.0         | 17.7        |
| Pomorie          | -2.9        | 2.2         | 1.0         | 4.2         |
| Burgas           | -2.6        | 1.2         | 2.3         | 1.7         |
| Sozopol          | 9.7         | 1.8         | 23.1        | 13.0        |
| Primorsko        | 9.2         | -2.9        | -4.5        | 2.1         |
| Tsarevo          | 5.6         | 0.7         | -8.6        | -10.9       |

Source: NSI, data processing NCTD

### Temporary population (Oscillating populated areas)

Apart from the permanent population, a temporary population is also staying in the municipalities. It is concentrated mainly in the coastal area, the national climate and local seaside resorts<sup>8</sup>, country-house zones and holiday villages and comprises tourists on vacation and individuals working in tourism (hotel concierges, waiters, cooks, cleaners, guards, auxiliary personnel of the beaches rented), services and commerce (personnel of catering and entertainment establishments and street vendors) during the summer season and in construction during the winter season. During the peak tourist season a much greater number of people are staying in the municipalities than is their permanent population. In accordance with the BSCDA, the recreational activity territories (Ок, Oc and ОВ) should be dimensioned based on a norm of 8 m<sup>2</sup> per person for beach strips with areas of up to 100 000 m<sup>2</sup> and 12 m<sup>2</sup> per person for beach strips with areas over 100 000 m<sup>2</sup> (Article 27(2)(1) of Regulation No 7 laying down rules and norms for the planning of individual types of territories and development zones)<sup>9</sup>.

It may be projected that over the period up to 2050 the Black Sea municipalities will continue to be among those with strongly oscillating numbers of residents related to the seasonal nature and scale of maritime tourism. This has a significant impact on the needs of social and technical infrastructure development.

<sup>8</sup> List of resorts in the Republic of Bulgaria, Decision of the CM of 24 February 2012

<sup>9</sup> SG No 3/2004, as amended and supplemented in SG No 21/1.03.2013



As a result of the brief analysis, the following more important **summary conclusions** may be drawn with regard to the demographic situation in the region in the 2011—2018 period.

- The current demographic situation in the area is characterised by a minimal population increase by 264 people, or by 0.04 %. Over the same period, the population of Bulgaria has declined by 4.5 %.
- A more significant increase is observed in the municipalities of Nessebar (by 4 734 inhabitants), Varna (1 726 inhabitants) and Avren (520 inhabitants).
- The urban population increased by 5 819 inhabitants, or by 0.9 % as a result of the positive mechanical population change.
- A more significant increase is observed in Burgas (by 2 950 inhabitants), Nessebar (by 2 512 inhabitants) Varna (by 1 724 inhabitants) and Sveti Vlas (by 865 inhabitants).
- The values of population ageing in Black Sea municipalities are by 2.5 percentage points more favourable than the national averages.
- A serious imbalance exists in the territorial distribution of the population — 85.7 % of the population of municipalities live in settlements whose land-use areas are located on the shore.
- 74.2 % of the population is located in the cities of Burgas and Varna.
- The share of urban population has been steadily increasing during the period under review. This was predetermined by the increased role of towns and cities in terms of employment opportunities, higher living standards and better access to specialised and better-quality health services, education and cultural events, etc.
- The population decrease, measured by the rate of natural population change in 2018, was minus 3.5 ‰, while the national figure was minus 6.6 ‰.
- The mechanical population change in these municipalities in 2018 was a positive 2.5 ‰, while the national figure stood at minus 0.5 ‰.
- In summer the population numbers increase manifold due to the large scale of maritime tourism.

The trends are expected to continue in future as well, i.e. the Black Sea municipalities will have strongly oscillating population numbers.

## **2.4. Employment and unemployment**

### **Employment**

In 2017 the number of employed individuals in Black Sea municipalities was 251 171, while in 2014 it was 244 908, meaning that the number of employed individuals increased by

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2.6 percentage points (or by 6 263 individuals). In 2017 employment increased compared to 2014 in 10 municipalities. The most significant increase was in the municipalities of Varna (by 4 553 people) and Nessebar (by 873 people), and some lagging was observed in Burgas where the number of employed individuals decreased by 1 089 people (or by -1.5 %).

Table 12: Employed individuals in Black Sea municipalities

| Municipalities   | 2014           | 2015           | 2016           | 2017           |
|------------------|----------------|----------------|----------------|----------------|
| <b>Black Sea</b> | <b>244 908</b> | <b>244 179</b> | <b>247 305</b> | <b>251 171</b> |
| Shabla           | 824            | 772            | 794            | 776            |
| Kavarna          | 2 922          | 2 941          | 3 096          | 3 080          |
| Balchik          | 6 587          | 6 278          | 6 852          | 7 087          |
| Aksakovo         | 3 886          | 4 236          | 4 534          | 4 643          |
| Varna            | 124 795        | 125 939        | 127 498        | 129 348        |
| Avren            | 1 114          | 1 205          | 1 296          | 1 232          |
| Dolni Chiflik    | 1 290          | 1 357          | 1 381          | 1 386          |
| Byala            | 817            | 743            | 709            | 738            |
| Nessebar         | 17 849         | 17 265         | 17 601         | 18 722         |
| Pomorie          | 5 530          | 5 440          | 5 352          | 5 384          |
| Burgas           | 71 961         | 70 775         | 70 873         | 70 872         |
| Sozopol          | 3 328          | 3 324          | 3 373          | 3 571          |
| Primorsko        | 2 133          | 1 984          | 1 978          | 2 189          |
| Tsarevo          | 1 872          | 1 920          | 1 968          | 2 143          |

Source: NSI

The breakdown of employed individuals by sectors of the economy in Black Sea municipalities in 2017 was as follows: primary (agriculture) — 6 007 people (2.4 %); secondary (industry) — 64 760 people (25.8 %); and tertiary (services) — 180 404 people (71.8 %).

The large share of the agriculture sector in the municipalities of Shabla, Kavarna and Dolni Chiflik is clearly evident from the table below, while in the municipalities of Nessebar, Sozopol, Primorsko and Tsarevo the share of the services sector exceeds 80 %.

Table 13: Employed individuals by economic activities (A3), 2017

| Municipalities   | Total          | Agriculture, forestry and fisheries | Industry      | Services       | Agriculture, forestry and fisheries | Industry | Services |
|------------------|----------------|-------------------------------------|---------------|----------------|-------------------------------------|----------|----------|
|                  |                | number                              |               |                | share - in %                        |          |          |
| <b>Black Sea</b> | <b>251 171</b> | <b>6 007</b>                        | <b>64 760</b> | <b>180 404</b> | 2.4                                 | 25.8     | 71.8     |
| Shabla           | 776            | 334                                 | 77            | 365            | 43.0                                | 9.9      | 47.0     |
| Kavarna          | 3 080          | 645                                 | 740           | 1 695          | 20.9                                | 24.0     | 55.0     |
| Balchik          | 7 087          | 573                                 | 1 586         | 4 928          | 8.1                                 | 22.4     | 69.5     |
| Aksakovo         | 4 643          | 532                                 | 2 409         | 1 702          | 11.5                                | 51.9     | 36.7     |
| Varna            | 129 348        | 1 158                               | 33 353        | 94 837         | 0.9                                 | 25.8     | 73.3     |
| Avren            | 1 232          | 196                                 | 100           | 936            | 15.9                                | 8.1      | 76.0     |
| Dolni Chiflik    | 1 386          | 338                                 | 237           | 811            | 24.4                                | 17.1     | 58.5     |
| Byala            | 738            | 70                                  | 71            | 597            | 9.5                                 | 9.6      | 80.9     |
| Nessebar         | 18 722         | 286                                 | 1 596         | 16 840         | 1.5                                 | 8.5      | 89.9     |

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| Municipalities | Total  | Agriculture, forestry and fisheries | Industry     | Services | Agriculture, forestry and fisheries | Industry | Services |
|----------------|--------|-------------------------------------|--------------|----------|-------------------------------------|----------|----------|
|                |        | number                              | share - in % |          |                                     |          |          |
| Pomorie        | 5 384  | 577                                 | 1 315        | 3 492    | 10.7                                | 24.4     | 64.9     |
| Burgas         | 70 872 | 993                                 | 22 527       | 47 352   | 1.4                                 | 31.8     | 66.8     |
| Sozopol        | 3 571  | 150                                 | 389          | 3 032    | 4.2                                 | 10.9     | 84.9     |
| Primorsko      | 2 189  | 65                                  | 149          | 1 975    | 3.0                                 | 6.8      | 90.2     |
| Tsarevo        | 2 143  | 90                                  | 211          | 1 842    | 4.2                                 | 9.8      | 86.0     |

Source: NSI, data processing NCTD

Pursuant to Article 25(2) of the Statistics Act<sup>10</sup>, any confidential data is anonymised via aggregation of economic activities. Those restrictions lead to certain difficulties in the conduct of analyses of employment in the municipality.

The breakdown by groups of enterprises, based on the number of employed individuals, in 2017 is as follows:

- micro (with up to 9 employees): 94 724 individuals (37.7 %);
- small (between 10 and 49 employees): 63 153 individuals (25.1 %);
- medium-sized (between 50 and 249 employees): 52 600 individuals (20.9 %);
- large (with more than 250 employees) 33 073 individuals (13.2 %).

The medium-sized enterprises and the large enterprises with more than 250 employees are located mainly in the district centres Varna and Burgas. In smaller municipalities individuals employed in micro enterprises prevail.

Table 14: Black Sea municipalities by groups of enterprises based on the number of individuals employed, 2017

| Municipalities   | Total          | Micro (with up to 9 employees) | Small (between 10 and 49 employees) | Medium-sized (between 50 and 249 employees) | Large (with more than 250 employees) |
|------------------|----------------|--------------------------------|-------------------------------------|---|--------------------------------------|
| <b>Black Sea</b> | <b>251 171</b> | <b>94 724</b>                  | <b>63 153</b>                       | <b>52 600</b>                               | <b>33 073</b>                        |
| Shabla           | 776            | 424                            | 352                                 | -   | -                                    |
| Kavarna          | 3 080          | 1 302                          | 1 152                               | 626   | -                                    |
| Balchik          | 7 087          | 2 006                          | 1 606                               | ..  | ..                                   |
| Aksakovo         | 4 643          | 1 136                          | ..                                  | 1 280                                       | ..                                   |
| Varna            | 129 348        | 45 233                         | 33 840                              | 29 842                                      | 20 433                               |
| Avren            | 1 232          | 506                            | 201                                 | ..  | ..                                   |
| Dolni Chiflik    | 1 386          | 894                            | 492                                 | -   | -                                    |
| Byala            | 738            | 444                            | ..                                  | ..  | ..                                   |
| Nessebar         | 18 722         | 8 588                          | 5 516                               | 3 495                                       | 1 123                                |
| Pomorie          | 5 384          | 2 916                          | 1 379                               | 1 089                                       | -                                    |
| Burgas           | 70 872         | 26 212                         | 17 502                              | 15 641                                      | 11 517                               |

<sup>10</sup> Published in SG No 57/1999, amended in SG No 38/24.04.2020

| Municipalities | Total | Micro (with up to 9 employees) | Small (between 10 and 49 employees) | Medium-sized (between 50 and 249 employees) | Large (with more than 250 employees) |
|----------------|-------|--------------------------------|-------------------------------------|---|--------------------------------------|
| Sozopol        | 3 571 | 2 127                          | ..                                  | 344   | ..                                   |
| Primorsko      | 2 189 | 1 382                          | 524                                 | 283   | ..                                   |
| Tsarevo        | 2 143 | 1 554                          | 589                                 | -   | -                                    |

Note: (..) the information is confidential

Source: NSI

## Unemployment

The unemployment rate is the relative share of unemployed individuals in the economically active population (workforce).

In 2018 the unemployment rate in Black Sea municipalities declined by 1.1 percentage points compared to 2014, falling to 3.9 %, and was significantly more favourable than the national average of 6.1 %.

At municipality level the unemployment rate is lowest in the municipalities of Varna (2.9 %) and Burgas (3.3 %), while a significant lag exists in the municipalities of Shabla (12.4 %) and Dolni Chiflik (12.1 %). The difference in unemployment rates between the best performing municipality of Varna and the worst performing municipality of Shabla is 9.5 percentage points. Municipalities in which the unemployment rate remains at double digit levels have serious structural problems on the local labour markets and low mobility of the population.

Table 15: Unemployment in Black Sea municipalities as of 31 December

| Municipalities   | 2016                                       | 2017           | 2018           | 2016               | 2017       | 2018       |
|------------------|--|----------------|----------------|--------------------|------------|------------|
|                  | Registered unemployed individuals – number |                |                | Unemployment rates |            |            |
| <b>Bulgaria</b>  | <b>201 466</b>                             | <b>232 066</b> | <b>261 015</b> | <b>8.0</b>         | <b>7.1</b> | <b>6.1</b> |
| <b>Black Sea</b> | <b>17 540</b>                              | <b>16 102</b>  | <b>13 695</b>  | <b>5.0</b>         | <b>4.5</b> | <b>3.9</b> |
| Balchik          | 688  | 600            | 493            | 8.5                | 7.4        | 6.1        |
| Kavarna          | 611  | 555            | 430            | 10.7               | 9.7        | 7.5        |
| Shabla           | 283  | 277            | 252            | 13.9               | 13.6       | 12.4       |
| Aksakovo         | 388  | 313            | 298            | 4.7                | 3.8        | 3.6        |
| Varna            | 6 520                                      | 5 924          | 5 048          | 3.7                | 3.4        | 2.9        |
| Avren            | 501  | 393            | 363            | 6.1                | 4.8        | 4.4        |
| Dolni Chiflik    | 989  | 930            | 762            | 15.7               | 14.7       | 12.1       |
| Byala            | 140  | 122            | 104            | 10.5               | 9.2        | 7.8        |
| Nessebar         | 847  | 786            | 660            | 8.1                | 7.5        | 6.3        |
| Pomorie          | 1 139                                      | 1 301          | 1 040          | 9.4                | 10.8       | 8.6        |
| Burgas           | 4 459                                      | 4 097          | 3 541          | 4.2                | 3.8        | 3.3        |
| Sozopol          | 495  | 369            | 329            | 9.9                | 7.4        | 6.6        |
| Primorsko        | 138  | 134            | 147            | 5.5                | 5.3        | 5.8        |
| Tsarevo          | 342  | 301            | 228            | 9.3                | 8.2        | 6.2        |

Source: NSI, Employment Agency

Typically for Black Sea municipalities, in the active tourist season from June to September there is a lack of qualified labour (cooks, waiters, interpreters, cleaners); this requires recruitment of personnel from other parts of Bulgaria and from abroad. During the autumn and winter season the shortage of qualified labour in construction requires recruitment of workers from abroad — mainly construction workers from Ukraine and Moldova.

The following *main conclusions* regarding employment and unemployment in Black Sea municipalities may be drawn in regard to the period for which latest data is available as of the date of this paper:

- Employment of the population has positive values — in the period between 2014 and 2017 it grew by 2.6 percentage points and the most significant increase was registered in the municipalities of Varna and Nessebar.
- The employees in the services sector predominate (71.8 %), and in some Black Sea municipalities the employees in the services sector account for over 80.0 %.
- The agriculture sector has a significant share in the municipalities of Shabla, Kavarna and Dolni Chiflik.
- In the breakdown by groups of enterprises for 2017 based on the number of employed individuals, the top position was held by micro enterprises (with up to 9 employees) — 94 724 people (37.7 %).
- The medium-sized enterprises and the large enterprises with more than 250 employees are located mainly in the cities of Varna and Burgas.
- In the active tourist season, there is a lack of qualified labour, which requires recruitment of personnel from other parts of Bulgaria and from abroad.
- Unemployment declined significantly in Black Sea municipalities, but in 2 municipalities the unemployment rate remains at double digit levels and this is indicative of serious structural problems on the local labour markets.
- The municipalities where unemployment rates are higher than 10 % are Shabla and Dolni Chiflik.

As in the case of the demographic indicators discussed above, there are significant differences in the values of the employment and unemployment indicators between the large municipalities of Varna and Burgas, on the one hand, and the other Black Sea municipalities, on the other hand.

According to Eurostat's *projections for the population* of EU Member States, the working-age population in Bulgaria will continue to decrease in the future<sup>11</sup>. This will be the main driver that will contribute to the shrinking of the workforce in municipalities. According to the labour demand and supply projections of Cedefop until 2025, both the workforce and employment in Bulgaria are expected to decrease. This trend is expected to continue until 2050 and will seriously affect the Black Sea municipalities as well. By **sectors of the economy**<sup>12</sup>, an increase in employment in

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<sup>11</sup> The Eurostat projections for the population of EU Member States cover the period until 2080.

<sup>12</sup> European Centre for the Development of Vocational Training (CEDEFOP).

economic activities in the Services sector will be observed against a decrease in economic activities in the Industry and Agriculture sectors.

### 3. Education

#### 3.1. Educational level of the population

One of the leading goals of the pan-European Europe 2020 Strategy is improvement of the educational level of the population, more specifically reducing of the share of early school leavers and increasing the share of the population of tertiary or equivalent education.

According to NSI data for 2011, the relative share of the population of Black Sea municipalities having an advanced education level (higher education) was 24.1 % (162 872 individuals) of the total population. The indicators are more favourable than the national average of 19.6 %. In terms of municipalities, the most educated are the populations of the municipalities of Varna (30.1 %) and Burgas (25.1 %). The poorest educational structure in regard to share of university graduates exists in the municipalities of Dolni Chiflik (4.8 %), Byala (7.8 %) and Avren (7.9 %).

302 463 persons (44.8 %) have secondary education, which is slightly above the national average (43.4 %). 128 075 persons (19.8 %) have primary education, 42 265 persons (6.3 %) have elementary education and 31 401 persons (4.4 %) have failed to complete elementary education. The last group is represented exclusively by Roma. At the foot of the education ladder are the individuals who “never attended school”. Their number is 6 279, or 0.9 % of the population aged 7 and over, given a national average of 1.2 %. The share of illiterate individuals is lowest in Dolni Chiflik (3.7 %), Kavarna (2.9 %), Avren (2.6 %) and Balchik (2.2 %).

Table 16: Population of Black Sea municipalities aged 7 and over by degree of education completed, as of 1.02.2011

| Municipalities   | Total   | Higher  | Secondary | Primary | Elementar<br>y | Incomplete<br>elementary | Never<br>attended<br>school | Children aged<br>up to and<br>including 7 years<br>who do not<br>attend school |
|------------------|---------|---------|-----------|---------|----------------|--------------------------|-----------------------------|--|
| <b>Black Sea</b> | 674 781 | 162 872 | 302 463   | 128 075 | 42 265         | 31 401                   | 6 279                       | 1 426  |
| Shabla           | 4 834   | 475     | 2 018     | 1 559   | 518            | 207                      | 53                          | 4  |
| Kavarna          | 14 343  | 1 707   | 5 315     | 3 779   | 2 212          | 883                      | 411                         | 36   |
| Balchik          | 18 894  | 2 143   | 7 057     | 5 502   | 2 586          | 1 145                    | 416                         | 45   |
| Aksakovo         | 18 814  | 1 864   | 7 266     | 6 365   | 1 827          | 1 189                    | 252                         | 51   |
| Varna            | 319 276 | 96 060  | 147 699   | 46 575  | 13 343         | 13 211                   | 1 830                       | 558  |
| Avren            | 7 851   | 624     | 2 480     | 2 791   | 1 242          | 501                      | 205                         | 8  |
| D. Chiflik       | 17 573  | 857     | 4 973     | 6 378   | 3 212          | 1 438                    | 643                         | 72   |
| Byala            | 3 006   | 235     | 1 120     | 843     | 465            | 279                      | 60                          | 4  |
| Nessebar         | 20 577  | 3 162   | 9 871     | 4 766   | 1 619          | 947                      | 152                         | 60   |
| Pomorie          | 25 549  | 2 917   | 9 943     | 7 805   | 2 713          | 1 725                    | 362                         | 84   |
| Burgas           | 198 064 | 49 777  | 94 142    | 33 977  | 9 693          | 8 478                    | 1 564                       | 433  |
| Sozopol          | 11 731  | 1 385   | 4 555     | 3 887   | 1 150          | 583                      | 139                         | 32   |

| Municipalities | Total | Higher | Secondary | Primary | Elementar<br>y | Incomplete<br>elementary | Never<br>attended<br>school | Children aged<br>up to and<br>including 7 years<br>who do not<br>attend school |
|----------------|-------|--------|-----------|---------|----------------|--------------------------|-----------------------------|--|
| Primorsko      | 5 645 | 639    | 2 434     | 1 561   | 649            | 271                      | 82                          | 9  |
| Tsarevo        | 8 624 | 1 027  | 3 590     | 2 287   | 1 036          | 544                      | 110                         | 30   |

Source: NSI, Population and Housing Census, 2011

### 3.2. Educational infrastructure

The educational structure and network in the municipalities under review is aligned with the applicable primary and secondary legal documents and with the local, state and European strategies on development of education. They comprise a well-established network of institutions which cover all age groups subject of mandatory education.

The *pre-school education* structures are well-developed over the entire territory of the Black Sea municipalities. The availability of kindergartens and personnel and the capacity of kindergartens are adequate.

In the school year 2018/2019, 157 separate kindergartens functioned in the municipalities and were attended by 23 914 children. They are located mainly in the municipalities of Varna (59) and Burgas (34).

In Black Sea municipalities training classes were provided in the school year 2018/2019 in 155 *general and specialised schools*. More than half of them are located in the municipalities of Varna (51) and Burgas (41).

*Vocational education and training* was provided in the school year 2018/2019 in 31 schools. The secondary vocational schools are located mainly in the larger municipalities: Varna (15) and Burgas (12), and there is one such school in each of the municipalities of Kavarna, Dolni Chiflik, Byala and Pomorie where a larger number of pupils are concentrated. Efforts continue to be made to foster stronger links and shorten the distance between vocational training and the economic priorities of municipalities and regions.

The institutions of the *Higher Education* system are strongly polarised in the territory of Black Sea municipalities and are located mainly in the cities of Varna and Burgas.

Varna is among the most important university centres in Bulgaria, hosting six higher education establishments which were attended by 24 000 students in the academic year 2018/2019. These are Nikola Vaptsarov Naval Academy; University of Economics – Varna; Medical University Prof. Dr. Paraskev Stoyanov; Technical University; Varna Open University Chernorizets Hrabar; and Varna University of Management.

Varna is also host to scientific research centres related to marine sciences and research in the area of maritime economic activities. Among them are the Institute of Oceanology, the Centre for Hydro- and Aerodynamics and a branch of the Institute of Meteorology and Hydrology of the Bulgarian Academy of Sciences, the Institute of Fishery Resources, the Institute of Water



Transport, and the Institute of Shipbuilding and of Metal Science. Based on their experience and traditions, on the environment established and on their participation in numerous international projects, they serve as focal points of knowledge, competence and valuable information on the marine environment, the changes in it and the activities conducted.

As a university centre, Burgas is host to two higher education schools: Burgas Open University and Prof. Dr. Asen Zlatarov University, the latter being founded in 1963 as the Higher Institute of Chemistry and Technology for the developing oil processing industry. In the academic year 2018/2019, 6 000 students were pursuing their studies there.

The following **conclusions** may be drawn from the brief analysis of the education and the infrastructure built:

- A highly educated population is concentrated in Black Sea municipalities, with a high share of population with university education (24.1 % for the region, 25.1 % in Burgas and 30.1 % in Varna).
- The relative share of the population with secondary education (44.8 %) is also high in said municipalities.
- Important general education and vocational schools are functioning in the cities of Varna and Burgas, most of which teach subjects related to the sea and the activities conducted in it and in the coastal area — tourism, port operations and logistics, maritime transport, etc.

The cities of Varna and Burgas are of greatest importance in the area of education and important university and research centres.

#### 4. Healthcare

The healthcare system is reviewed in order to identify the opportunities for providing services during the active tourist season, when the population numbers in Black Sea municipalities increase several-fold.

In 2018 the hospital care infrastructure included **32 hospitals** with a combined capacity of 4 932 beds in the NER, which represents 9.2 % of hospitals and 9.3 % of the hospital beds in Bulgaria, and **46 hospital establishments** with a combined capacity of 6 805 beds in the SER, which represents a further 13.3 % of hospitals and 12.8 % of hospital beds in the country. The main part of the hospitals in the North Black Sea Coast Region are concentrated in the district of Varna where 16 hospitals with a total of 2 670 beds are located, including 6 general hospitals with 2 057 beds (50.0 % of the total number of hospitals in the region's territory). 567 hospital beds are available per 100 000 people in Varna district, and 438 hospital beds — in Dobrich district. For the SER and respectively for the South Black Sea Coast Region the hospitals are concentrated in the district centre — the city of Burgas where a total of 20 hospitals with a total of 2 910 beds are located, of which 9 general hospitals with 1 407 beds. 709 hospital beds are available per 100 000 people in Burgas district.



As of 31.12.2018 there were 286 **outpatient care establishments** in the NER with 212 beds for short-term supervision and stay, which represents 13.8 % of the outpatient care establishments and 16.9 % of the beds in Bulgaria. The main part of these establishments are concentrated in Varna district, where there are 182 outpatient care establishments, or 63.6 % of the total number of outpatient care establishments in the territory of the region. There are 270 outpatient care establishments in the SER with 234 beds for short-term supervision and stay, which represents 13.1 % of the outpatient care establishments and 18.7 % of the beds in Bulgaria. In Burgas district there are 92 such establishments with 140 beds, or more than half of the number for the entire region.

Given a national average **medical service density** of 1 doctor per 236 individuals and 1 dental medicine doctor per 967 individuals (2018), in the NER the figures stand at 1 doctor per 253 individuals and 1 dental medicine doctor per 1 082 individuals, while in the SER they stand at 1 doctor per 289 individuals and 1 dental medicine doctor per 1 279 individuals. In the Varna district the figures are 1 doctor per 200 individuals and 1 dental medicine doctor per 828 individuals and are more favourable than the medical service density in the remaining parts of the region due to the existence of a medical university and a university hospital. In Burgas district the medical service density is 1 doctor per 305 individuals and 1 dental medicine doctor per 1 324 individuals.

The Black Sea Coast Region is served by 2 emergency medical care centres in Varna and Dobrich and 7 branches for its northern section, and by 1 EMCC in Burgas and 5 branches for its southern section.

A medical service system has been put in place for the major resorts along the coast. It is complemented by private medical centres and by medical and/or dental medicine services provided at the major hotels.

## **SOURCES OF INFORMATION**

Integrated territorial development strategy for the North-eastern Region (*draft*)

Integrated territorial development strategy for the South-eastern Region (*draft*)

National spatial development concept for the 2013—2025 period, 2019 Update

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Socio-economic Analysis of the Regions in the Republic of Bulgaria, 2020 Update